



---

# Will Planning

March 2023

3395 Hayhurst Crescent  
Oakville, ON L6L 6W9  
Canada

TEL: (905) 337-3121  
FAX: (905) 337-3272  
CELL: (416) 526-3121

[WWW.SMARTWILLS.CA](http://WWW.SMARTWILLS.CA)



**SmartWills**<sup>©</sup>  
ESTATES & TRUST LAW



## WILL PLANNING KEY INFORMATION

FULL NAME (including middle names and/or versions of your name eg. Patricia Alice Ryan also known as Tricia Ryan):

---

Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_

---

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_

Marital Status (married, divorced, engaged, single, remarried, widowed, separated):

---

Husband/Wife/Partner's Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_

**CHILDREN:**

Full Name	Address	Date of Birth	Status*

\*Whether the child is from this relationship, a previous relationship or other circumstances

\*Is the child married/partnered?

**WHO WILL BE YOUR PRIMARY EXECUTOR OF YOUR WILL?**

Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_

WHO WILL BE YOUR SECONDARY EXECUTOR OF YOUR WILL? (This is often a backup person if your marriage partner is not able to be the primary Executor)

Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_

DO YOU HAVE NOMINATED GUARDIANS FOR YOUR CHILDREN IF THEY HAVE NOT REACHED ADULTHOOD?

Option #1:

Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_



Option #2:

Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number(s): \_\_\_\_\_

Email Addresses: \_\_\_\_\_

**ESTATE CONTENTS:**

Home: \_\_\_\_\_

Cottage: \_\_\_\_\_

International Property: \_\_\_\_\_

RRSP/TFSA/RRIF: \_\_\_\_\_

Insurance: \_\_\_\_\_

Pensions: \_\_\_\_\_

Ownership in private corporation: \_\_\_\_\_



**DO YOU OWN A BUSINESS?**

Yes/No: \_\_\_\_\_

Name of the business(es): \_\_\_\_\_

**IS YOUR HOME/PROPERTY IN JOINT TENANCY OR TENANTS IN COMMON?**

Select One: \_\_\_\_\_

**DO YOU HAVE PRIMARY AND SECONDARY BENEFICIARY ON ALL FINANCIAL PRODUCTS? If not, please add a second person.**

1. Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

2. Name: \_\_\_\_\_ Relationship To You: \_\_\_\_\_

**DO YOU HAVE SPECIFIC ITEMS E.G. CARS, ORNAMENTS, JEWELLERY TO GO TO CERTAIN INDIVIDUALS?**

Name	Address	Description

HOW DO YOU WANT YOUR ESTATE DIVIDED AMONGST FAMILY MEMBERS/CHILDREN?

Name	Address	Description	Amount (\$)

DO YOU HAVE ANY SPECIAL BEQUESTS (set amount of money) TO GO TO INDIVIDUALS OR CHARITIES?

Name	Address	Amount (\$)

IF YOUR FAMILY SHOULD PASS (for example in a plane crash) WHO WOULD YOU WANT TO BE ALTERNATE BENEFICIARY?

Name	Address	Amount (\$)