



PLANNING
NETWORK

Wills and Estate Planning Worksheet

Making a Will can be intimidating. That's why it's highly recommended you work with a lawyer. They can help your family consider long-term priorities and goals for your assets. They can assist with making the necessary arrangements to ensure your wishes and preferences are respected and carried out to benefit the people you care about – particularly those with disabilities.

Take a look at this checklist and charts to help you prepare and gather some information before you meet with your lawyer to start your family estate planning process. Most lawyers will have their own questionnaire that they will want you to complete when you start to work with them. After completing this worksheet, you will be ready to contact a lawyer of your choice to make a Will. This worksheet does not give any legal advice. To draft a Will, you need to see a qualified lawyer.

Step 1: Gathering Important Documents

- Copies of your most recent Identification: Driver's License or Passport
- Life Insurance policy or policies: value, policy name, policy number, and type of policy (term, life, joint, last to die, etc.)
- Financial savings or liabilities (debts): Pension details, RRSPs, TFSAs, RESP and RDSP, mortgage, debts, lines of credit etc. See the charts on the following pages for more details.
- Information regarding significant rewards programs: for example, Aeroplan, Scene Point, etc
- Deeds and other important ownership documents. See the charts on the following pages for more details.

Step 2: Summary of your Assets and Liabilities

Pension Name	Issuer	Owner	Beneficiary	Amount
Does a beneficiary qualify as a person with a disability? <input type="checkbox"/> Yes <input type="checkbox"/> No				
RRSP/RRIF/LIRA/LIF	Financial Institution	Owner	Beneficiary	Value
RESP	Financial Institution	Owner	Beneficiary	Value
TFSA	Financial institution	Owner	Beneficiary	Value

Life Insurance	Person Insured and Owner	Beneficiary and Alternate	Amount	Type policy
Company: Policy name: Policy #: _____ (NOTE: You will need to share a copy of the policy sheet with your lawyer)	Person insured: Owner of policy:	Beneficiary: Alternate:		<input type="radio"/> Term <input type="radio"/> Permanent <input type="radio"/> Individual <input type="radio"/> Joint Last to Die <input type="radio"/> Joint First to Die <input type="radio"/> Other <input type="radio"/> Unsure
Company: Policy name: Policy #: _____ (NOTE: You will need to share a copy of the policy sheet with your lawyer)	Person insured: Owner of policy:	Beneficiary: Alternate:		<input type="radio"/> Term <input type="radio"/> Permanent <input type="radio"/> Individual <input type="radio"/> Joint Last to Die <input type="radio"/> Joint First to Die <input type="radio"/> Other <input type="radio"/> Unsure

Step 3: Other Assets and Liabilities

[illegible]

Step 4: Identifying the Important People

Making an estate plan involves deciding who should deal with your personal affairs when you are gone.

The following chart will help you better identify the right person for the role. This is only a guide to help you think about the important people in your life and your family member's life.

	Name:	Email:	Phone number:	Home address:	Relationship to me:
Potential Executor Person or people who will oversee the administration of your estate					
Potential trustees for trusts This person or people administer(s) funds in the trust					
Potential Beneficiary Person or people receiving your assets					
Potential Guardian Someone who would have custody of your young children, should you and your spouse pass away together.					

Potential Attorney for Property Someone to make property decisions (handling finances, choosing investments, etc.) on your behalf.					
Potential Attorney for personal care Someone to decide for you about matters relating to your health care, hygiene, nutrition, safety, shelter and clothing					



PLANNING
NETWORK

www.planningnetwork.ca

