



Lindsay Kenney LLP
Barristers & Solicitors
Founded in 1980

WILLS QUESTIONNAIRE

Below are points to consider with respect to your Will:

- If you marry after you make your Will, your Will is void (of no effect);
- If you divorce after you make your Will, your spouse's designation as an executor and/or beneficiary is void;
- Income and probate taxes may be minimized by the proper gifting of your RRSP's, RRIF's or insurance proceeds or by placing some (not all) assets in joint tenancy;
- Not all of your assets will form part of your estate and be distributed in accordance with your Will: land, bank accounts and investments in joint names may pass to the surviving co-owner by right of survivorship – the benefit of insurance policies, pensions, RRSPs and RIFs may pass to designated beneficiaries;
- Executing an enduring Power of Attorney along with your Will enables your next of kin to pay your bills, purchase more suitable care or accommodation for you, raise money for necessary surgeries, etc., in the event you become incapacitated.

Your Full Legal Name: _____

Your Address: _____
_____ Postal Code: _____ Tel: _____

Marital Status: never married married common law separated divorced widowed

Spouse's Full Legal Name : _____

Date & Place of Most Recent Marriage or Divorce: _____

Your Occupation: _____ Spouses Occupation _____

Your Place and Date of Birth: _____ Resident in BC for _____ years.

Any children? No Yes, as follows (attach list if necessary):

Child #1 Name: _____ Under 19 Adopted Other: _____

Child #2 Name: _____ Under 19 Adopted Other: _____

Child #3 Name: _____ Under 19 Adopted Other: _____

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The first Executor shall be my spouse, then the 1st Alternate Executor below, then the 2nd Alternate

The first Executor shall be the 1st Alternate Executor below, then the 2nd Alternate.

1st Alternate Executor's Name: _____ Relation _____

1st Executor's Address: _____

2nd Alternate Executor's Name: _____ Relation _____

2nd Executor's Address: _____

Guardian's Name: _____ Relation: _____

Guardian's Address: _____

Which of the following matches your wishes?:

Leave everything to my spouse if alive, if not, to children equally

Leave everything to my children equally

Leave everything to _____

I wish to be: cremated buried an organ donor (I will enroll at <http://www.transplant.bc.ca>)

Have you signed a cohabitation, marriage, or separation agreement? yes no

I am contemplating getting: married divorced in the future.

I would like to keep my will in a vault at my lawyer's office and provide a notice to the BC Government that I have done so. yes no

I would like to discuss having a: Power of Attorney Healthcare Directive

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