



WILL and ESTATE QUESTIONNAIRE

SECTION I - FAMILY INFORMATION

PERSONAL INFORMATION:

Full Name: _____ Date of Birth: _____

Address: _____

Phone: _____ Alt. Phone: _____

Occupation: _____

Spouses Full Name: _____ Date of Birth: _____

MARRIAGE INFORMATION:

Marital Status: _____

Date & Place of Marriage: _____

Previous Marriage: YES ___ NO ___

If yes:

1. name of previous spouse and date of death/divorce/separation:

2. Obligations pursuant to previous marriages (e.g. spousal & child maintenance):

YES ___ NO ___

If you are single, separated or divorced:

(a) Are you planning on marrying in the near future? _____

(b) Are you now cohabitating with anyone? _____

CHILDREN

Number of Children: _____

1. Full Name _____

Address _____

Date of Birth _____

Marital Status _____

Spouse _____

Grandchildren

Full Name _____

Age _____

Address (if different from above) _____

2. Full Name _____

Address _____

Date of Birth _____

Marital Status _____

Spouse _____

Grandchildren

Full Name _____

Age _____

Address (if different from above) _____

3. Full Name _____

Address _____

Date of Birth _____

Marital Status _____

Spouse _____

Grandchildren

Full Name _____

Age _____

Address (if different from above) _____

Are any of the children or grandchildren mentally or physically incapacitated?
YES _____ NO _____

If yes, please describe: _____

SECTION 2 - INSTRUCTIONS FOR WILL

EXECUTOR(S):

If your spouse is the sole beneficiary of your Estate, it may be preferable to name him/her as the primary Executor. You should also name alternates if your first choice is unable to act. For tax reasons, it is not advisable to choose an Executor who resides outside of Canada. At least one Executor should be a resident of Alberta.

1. Full Name: _____

Relationship: _____ Age: _____

Address: _____

ALTERNATES

2. Full Name: _____

Relationship: _____ Age: _____

Address: _____

3. Full Name: _____

Relationship: _____ Age: _____

Address: _____

GUARDIAN(S) FOR MINOR CHILDREN:

1 Full Name: _____

Relationship: _____ Age: _____

Address: _____

ALTERNATE GUARDIAN(S)

2. Full Name: _____

Relationship: _____ Age: _____

Address: _____

BENEFICIARIES

The following choices as to distribution of your Estate are for your convenience only. It is intended to get you thinking about the issues to be discussed with your lawyer.

1. All to spouse: YES _____ NO _____ Other: _____

2. If spouse predeceases me:

Equally to all children? YES _____ NO _____

All to children but different percentages to particular children?

3 At what age are your children to receive their share of your Estate?

_____ all at 18

_____ % at _____ years of age

_____ % at _____ years of age

_____ % at _____ years of age

other _____

The age of majority is 18 in Alberta. Unless specified otherwise, the Will shall be drafted so that your Executor will hold each child's share in trust until the specified age with power to encroach on income and capital for education, maintenance and support.

4. If one child dies before you do, or before attaining the age at which he is entitled to the share, who shall receive that share or the amount remaining?

_____ the children of the deceased child (my grandchildren)

_____ my surviving children only

_____ other please explain: _____

5. Family Demise:

How is your Estate to be divided if you and your spouse and all your children and grandchildren are killed in a common accident, or if any of your children or Grandchildren survive you but die before becoming entitled to receive their entire portion of your Estate?

_____ 1/2 to my parents and 1/2 to spouse's parents

_____ 1/2 to my brothers and sisters and 1/2 to my spouse's brothers and sisters who are then-alive in equal shares

_____ charities: _____

_____ other: _____

6. Specified Gifts or Legacies - list items or amounts and who is to receive it:

(Caution: Do not list any items unless they are definitely valuable or of great sentimental value or unless you are prepared to pay your lawyer to draft the Will and change it when an item is sold or replaced).

7. Money for Guardians:

If it becomes necessary for the guardians that you have named to look after and raise your minor children, will they require:

_____ A lump sum of money to be paid to them to buy a larger house, to renovate their current house, to buy a larger vehicle etc. in order to accommodate your children?

If so, then how much would you like to give to them for this purpose?

_____ A monthly amount to be paid to them to assist with the additional monthly expenses that they will incur as a result of raising your children? YES _____ NO _____

If so, then how much per month per child would they require?

8 . Executor Compensation:

Executors are generally entitled to receive compensation for the time, effort and expertise that is spent by them in administering your Estate. This can be a lump sum amount or a percentage of your Estate. If you wish your Executor to receive compensation for acting on your behalf it is often simpler to specify the amount or percentage of your Estate that you would like them to receive as compensation. In addition they will be entitled to reimbursement for any out-of-pocket expenses they incur in administering your Estate.

In Alberta a rough guideline of the compensation that an Executor is entitled to is 1 % to 5 % of the value of your Estate. If you wish to specify in your Will the compensation that is to be received by your Executor will it be:

____ A percentage of your Estate, and if so, what will that percentage be? _____%

____ Will it be a set amount, and if so, how much will that amount be? _____

FUNERAL ARRANGEMENTS:

On your death do you want your body to be buried: YES_____ NO _____

If you have answered yes, do you have a preference as to where it should be buried?

Would you prefer that your body be cremated? YES_____ NO _____

If you have answered yes, do you have any instructions as to what is to be done with your ashes? _____

Have you already prearranged these matters? If so, with which company:

If you have any questions while completing this questionnaire call Lee Olesen at (780) 460-3080. This form can be returned by:

- Emailing it to lee@olesenlawoffice.com
- Faxing it to (780) 419-7171
- mailing it to: **Olesen Law Office**
17 Kirkwood Dr.,
St. Albert, AB T8N 6J3
- Or call 460-3080 for other arrangements.

For office purposes:

Date received _____ File Number _____