

GILMORE AND GILMORE WILL QUESTIONNAIRE

Client Information:

- Your full name: _____
- Your address: _____
- Phone Number:
 - Home: _____
 - Work: _____

Executor:

- The executor(s) is responsible for the administration of your Estate. You may select one or more initial and alternate executor(s). Please state their relationship to you (i.e. spouse, son, daughter, etc.)
- Initial executor(s):

- Alternate executor(s):

Specific Bequests:

- You may leave specific things to a person in your Will. If you leave a bequest to a minor, it may have to be kept by someone else until the child turns 18. Please list your specific bequest below (if more room is required, please list on a separate sheet):
Name: _____ Bequest: _____
Name: _____ Bequest: _____
Name: _____ Bequest: _____
Name: _____ Bequest: _____

Distribution of Estate:

- Initial beneficiary(s) - please indicate relationship (wife, mother, child eg):
Name: _____ Relationship: _____
Name: _____ Relationship: _____
- Alternate beneficiary(s) - if initial beneficiary(s) die before you:
Name: _____ Relationship: _____
Name: _____ Relationship: _____
- Further alternate beneficiary(s) - if the preceding beneficiary(s) die before you:
Name: _____ Relationship: _____
Name: _____ Relationship: _____

Children:

- If part of your Estate goes to children, you may want to specify an age or ages (greater than the age of majority) at which they are to receive the money.
Example: Age 20 years Percentage: 20% of Estate
 Age 25 years 50% of balance of Estate
 Age 29 years 100% of balance of Estate
- Age Percentage
 _____ _____
 _____ _____
 _____ _____

- Do you want your executor to have the discretion to make payments for the benefit of the children before the final distribution age for school, medical etc.
 Yes: _____ No: _____

- If a Will refers to "children" or another generically defined group, the executor must do a number of searches to ensure whether or not there are any illegitimate children included in the group. To make it easier for the executor, you can "cut out" any potential illegitimate children. Do you want to "cut out" illegitimate children?
 Yes: _____ No: _____

Guardian:

- Do you want to name a guardian for your children in case your spouse has passed away? It is usually a good idea to name a couple as guardians. The Courts will ultimately determine who the children will live with.
- Guardian:
Name(s): _____
Address: _____

Investments:

- If it will be some time before the Estate is completely administered, it will be necessary for investments to be made. You may specify any investments or you may specify *Trustee Act Investments*. The latter investment type does not generate the best rate of return, however, they are relatively safe investments.
- *Trustee Act Investment:* _____ Any investments: _____

Funeral Arrangements:

- You may simply tell your executor what arrangements you would like the executor to make concerning your funeral. You may also list those directions in your Will. eg. cremation, burial location, organ donation etc.
- Funeral Directions:

Issues to be Aware of

Supported Dependants: The law requires that a person make adequate provisions for their dependants. Dependants are spouses, children and grandchildren who are financially dependant upon you at the time of your death. If adequate provision is not made of them in your Will, they may bring an Application to vary the terms of your Will, following your death.

RRSP's: If you own RRSP's, you may designate a beneficiary who will receive those RRSP's in the event of your death. If the RRSP beneficiary designation is to a spouse or

financially dependant child or grandchild, the RRSP can pass to the beneficiary without tax being paid. If you designate a beneficiary on your RRSP and that beneficiary is not a spouse, financially dependant child or grandchild, the beneficiary will receive 100% of the RRSP funds and your Estate will have to pay the tax. This is a result that most people do not intend. As a result, you may wish to consider not designating a beneficiary on an RRSP unless the person is a spouse or financially dependant child or grandchild. You should be aware that if you designate a spouse, financially dependant child or grandchild as a beneficiary and they do not roll over the RRSP into an RRSP of their own tax will be triggered.

POWER OF ATTORNEY FOR PROPERTY AND PERSONAL CARE

- It is possible for you to have a Power of Attorney which will allow your attorney to sign documents and otherwise deal with your assets on your behalf if you are unable to do so. A Power of Attorney can be exercisable in the event of mental incapacity, or for personal reasons if you so desire. You may also do a Power of Attorney of Personal Care, which permits the named attorney to make personal care decisions on your behalf. If you want Powers of Attorney prepared list the names and address of the proposed attorneys.

- Power of Attorney: Property:_____ Personal Care: _____ Both: _____

- Initial attorney(s):

- Alternate attorney(s):

Please return to:

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