



Date:

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**Personal Information - Client**

<b>Name:</b>				
<b>Address:</b>				
<b>Telephone:</b>	<b>Residence:</b>	<b>Business:</b>	<b>Cellular:</b>	<b>Facsimile:</b>
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>		
<b>Marital Status:</b>		<b>Date:</b>	<b>Place:</b>	
<b>Marriage/Separation Agreement:</b>		<b>Particulars:</b>		

**Spouse Information**

<b>Name:</b>			
<b>Telephone:</b>	<b>Cellular:</b>	<b>Business:</b>	<b>Facsimile:</b>
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>	

**Information - Children**

<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		

**Mentally/Physically Challenged or Otherwise Dependent**

<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date:</b>	<b>Birth Place:</b>
<b>Address:</b>		

**Other Intended Beneficiaries**

<b>Name:</b>		
<b>Age:</b>	<b>Birth Date (if minor):</b>	<b>Relationship:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date (if minor):</b>	<b>Relationship:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date (if minor):</b>	<b>Relationship:</b>
<b>Address:</b>		
<b>Name:</b>		
<b>Age:</b>	<b>Birth Date (if minor):</b>	<b>Relationship:</b>
<b>Address:</b>		

**Executors**

<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	

**Trustees (if different from Executors)**

<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	

**Guardians for Infants**

<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	

**Cash**

<b>Safe Deposit Box:</b>	<b>Location:</b>	
<b>Bank/Credit Union:</b>	<b>Location:</b>	<b>Ownership:</b>
<b>Bank/Credit Union:</b>	<b>Location:</b>	<b>Ownership:</b>
<b>Bank/Credit Union:</b>	<b>Location:</b>	<b>Ownership:</b>
<b>Bank/Credit Union:</b>	<b>Location:</b>	<b>Ownership:</b>

**Life Insurance**

<b>Company:</b>	<b>Policy #:</b>	<b>Value:</b>	<b>Beneficiary:</b>
<b>Company:</b>	<b>Policy #:</b>	<b>Value:</b>	<b>Beneficiary:</b>
<b>Company:</b>	<b>Policy #:</b>	<b>Value:</b>	<b>Beneficiary:</b>
<b>Company:</b>	<b>Policy #:</b>	<b>Value:</b>	<b>Beneficiary:</b>

**Real Estate**

<b>Legal Description:</b>	<b>Value:</b>
<b>Legal Description:</b>	<b>Value:</b>
<b>Legal Description:</b>	<b>Value:</b>
<b>Legal Description:</b>	<b>Value:</b>
<b>Legal Description:</b>	<b>Value:</b>

**Personal/Household**

Description:	Value:
Description:	Value:
Description:	Value:
Description:	Value:
Description:	Value:
Automobile:	Value:
Automobile:	Value:
Automobile:	Value:
Boats:	Value:
Interest in other Estates:	Value:

**Business/Farm/Partnership**

Description:	Value:
Machinery & Equipment:	Value:
Grain on Hand:	Value:
Cattle:	Value:

**RRSPs/RRIFs/Pensions/Annuities**

Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:
Company:	Contract #:	Value:	Beneficiary:

**Other Investments**

Bonds:	#:	Value:	Location:
Bonds:	#:	Value:	Location:
Stocks:	#:	Value:	Location:
Stocks:	#:	Value:	Location:
Stocks:	#:	Value:	Location:

**Liabilities**

Land Mortgage Co.:	Property Covered:	Balance:
Land Mortgage Co.:	Property Covered:	Balance:
Chattel Mtg. Co.:	Property Covered:	Balance:
Chattel Mtg. Co.:	Property Covered:	Balance:
Leases:		
Indemnities:		
Guarantees:		
Separation Agr.:		
Maintenance:		

**General Information**

Do you/spouse have a will?
Accountant Name/Address:
Investment Broker/Address:
Life Insurance Agent/Address:
Beneficiary under any trust?
Have you set up any trusts?
Party to corporate buy/sell agreement?
Any assets outside SK?

**Will Provisions - Specific Bequests**

As directed or may agree
Household/personal effects/jewelry
Automobiles
Real Estate
Cottage
Farmland
Other

**Will Provisions - Charitable Gifts**

<b>Name/Address</b>
<b>Name/Address</b>
<b>Name/Address</b>

**Will Provisions - Trusts**

<b>Spouse</b>
<b>Children</b>
<b>Mentally/Physically Challenged</b>

**Will Provisions - Residue**

<b>Souse:</b>	<b>Particulars</b>
<b>Children:</b>	<b>Particulars</b>

**Will Provisions - General**

<b>Insurance Policy Beneficiary Designations</b>	
<b>RRSP Beneficiary Designations</b>	
<b>Powers of Personal Representatives</b>	
<b>Matrimonial Property</b>	
<b>Forgiveness of Debts</b>	
<b>Funeral?</b>	<b>Particulars</b>
<b>Remains</b>	<b>Particulars</b>

**Power of Attorney**

<b>Attorneys</b>	<b>Particulars</b>
<b>Guardians</b>	<b>Particulars</b>
<b>Health Care Proxy Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Health Care Proxy Name:</b>	<b>Relationship:</b>
<b>Address:</b>	
<b>Heroic Measures?</b>	<b>Other Instructions</b>