



MOLLY XIA
Notary Public

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WILLS QUESTIONNAIRE

This questionnaire is designed to help you gather the preliminary information needed to create a Will. Once completed, make an appointment to meet me in my office and I will assist you in making a legal Will. All information contained within this questionnaire is strictly confidential and will not be shared with others pursuant to my Privacy Policy. For a copy of the Privacy Policy, please ask.

Please be as detailed as you wish. Form many of the questions, a simple Yes or No is sufficient.

INFORMATION ABOUT YOU

Full Legal Name: _____
 Address: _____
 Gender: _____
 Date of Birth: _____
 City of Birth: _____
 Citizenship: _____
 Phone: _____

MARITAL STATUS

Married: _____ Never Married: _____ Common Law: _____ Engaged: _____
 Separated: _____ Divorced: _____ Widowed: _____

If "Common Law", have you cohabited for two years or more? _____
 Have you ever signed a cohabitation, marriage, or separation agreement? _____
 Have you had any previous marriages? _____

INFORMATION ABOUT YOUR SPOUSE

Full Legal Name: _____
 Address: _____
 Date of Birth: _____
 City of Birth: _____
 Citizenship: _____
 Phone: _____

INFORMATION ABOUT YOUR CHILDREN AND DEPENDANTS

Name	Age	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

If there is someone else that is dependent upon you for support, list their names

Name and Relationship	Age	Date of Birth
_____	_____	_____
_____	_____	_____
_____	_____	_____

Do any of the above listed persons have any mental or physical disabilities: _____

GUARDIAN(S) OF YOUR CHILDREN

If you have any children who may still under the age of majority (Age 19) upon your death, who would you like to be their legal guardian(s)?

Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____

If the above-named person(s), for whatever reason, cannot be the guardians of your children, who do you want to take their place?

Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____

EXECUTORS OF YOUR ESTATE

You may appoint as few or as many executors as you wish. An executor should be someone who is able to take authority, understand your personal needs and, or if possible, resides close enough to spend time going through your personal effects.

List the person or persons that you wish to act as your executor:

Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____

If the above-named person(s), for whatever reason, cannot be your executor(s), who do you want to take their place? These will be your alternate executor(s). Note: You do not have to name anyone.

Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____

If the above-named person(s), for whatever reason, cannot be your alternate executor(s), who do you want to take their place? These will be your second alternate executor(s). Note: You do not have to name anyone.

Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____
Name: _____ Relationship: _____
Address: _____

BENEFICIARIES AND WISHES

Your executor(s) are responsible for first paying off your debts. Whatever is left after the debts are paid is called the residue. In this section, you will list those person(s) to whom you wish to give the residue of your estate. You may give specific items of your estate to a particular person (My son is to get my gold watch), and/or it may be more general (My wife gets everything, and if she dies before me, then all goes to my children, and if my children die before me, then all goes to my children's children).

Please complete as much or as little of the following as you wish. We will discuss your options when we meet.

Note: your spouse and natural children have the right to make an application to the court to vary the Will under the Wills, Estates and Succession Act in the event that your Will does not provide for a fair distribution.

① If there are specific bequests, state them here (You may leave this part blank):

Name	Relationship	Specifics (Cash or Items)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

② Who is to be beneficiary(ies) of your estate?

Name	Relationship
_____	_____
_____	_____
_____	_____
_____	_____

Notes on the above:

3 If the beneficiary named in #2 above dies before you, who shall get their portion?

Name	Relationship
_____	_____
_____	_____
_____	_____
_____	_____

Notes on the above:

4 If the beneficiary named in #3 above dies before you, who shall get their portion?

Name	Relationship
_____	_____
_____	_____
_____	_____
_____	_____

Notes on the above:

ASSETS

Do you own real property? _____

If YES, list their addresses below:

It is important that your name as shown in your Will matches exactly to the name that is registered on the title to your real property. If the name on the title to the property does not match your Will, there may be issues in dealing with your property after you die. I require that I search the titles to your property at the Land Title Office to ensure that there will be no problem. The fee per title searched is \$20.00. This requirement will be waived if you provide me with a copy of the title.

We will discuss other assets that you may own when we meet.

REMAINS

Do you wish to have your remains: Buried _____ Cremated _____

Funeral or other wishes: _____

WILL LOCATION

It is important that your executor knows of the location of your Will and has access to it when needed. It is mandatory that the location be registered with Vital Statistics. The fee for registration is \$30.00.

Where do you intend to keep your Will (Provide the complete address)?

POWER OF ATTORNEY

Do you have a Power of Attorney? _____

Do you want us to prepare a Power of Attorney for you? _____

Thank you for completing this questionnaire. Either bring it to me when we meet or email it to me at molly@mollynotary.com. We will discuss your options and prepare for you the Will that suits your needs.