

Are any of your children residents
or citizens of other countries? Yes
No

Are any of your children married? Yes
No

If Yes, provide your child's name,
name of spouse, name(s)/ages of
grandchildren

Details of relevant personal
situations (physical challenges,
disabilities, etc.)

EXTENDED FAMILY

Father's full name	Deceased	Yes No
Mother's full name	Deceased	Yes No
Names of siblings		

Nieces/Nephews names/ages

Employer's Name/Contact

Pension provider/contact

ASSET INFORMATION

Accountant's Name

Accountant's Phone Number

YOUR HOME

Names on titles

Type of ownership

Current Market Value
(including upgrades)

Value of
Mortgage or
other
Encumbrances

Significant household upgrades in the last 5 years:

Date, Cost, Description

Acquisition Cost and Date

OTHER REAL ESTATE

Address

Names on Title and how is
it owned?

Current Market Value
(including upgrades)

Value of
Mortgage or
other
Encumbrances

Significant household upgrades in the last 5 years:

Date, Cost, Description

Acquisition Cost and Date

REGISTERED INVESTMENTS

RRSPs or RRIFs

Please list the Plan Holder,
who it was issued by, the
beneficiary, and the value
to the estate.

TAX FREE SAVINGS ACCOUNTS

Please list the owner of the
accounts, the financial
institution, the beneficiary,
and the value to the estate.

PENSIONS

Please list pension
provider, contact
information, and
beneficiaries

INSURANCE

Name of Insurance
Provider

Phone Number

Please list Issuer, Policy
Number, Name of Owner,
Name of Life Insured,
Name of Beneficiary

BANK ACCOUNTS

Please list Name of Bank,
Address of home branch,
type of account, account
number, ownership

INVESTMENT ACCOUNTS

Name of Advisor, Contact
information, and approx.
value of portfolio

NON-REGISTERED ASSETS

Do you own any stocks, bonds,
GICs, etc. separate from your
investment acct?

Yes
No

Do you own any US
stocks or bonds?

Yes
NO

If yes, please attach a list including current value, acquisition cost, date, and location of it.

DEBTS OWING BY YOU, INCLUDING PROMISSORY NOTES

Please list name of creditor,
amount owing, maturity date,
and any other terms

DEBTS OWING TO YOU, INCLUDING PROMISSORY NOTES

Please list name of debtor,
amount owing, maturity
date, and any other terms

AUTOMOBILES, BOATS, RECREATIONAL VEHICLES

Please list description of
vehicle, VIN, ownership,
value, location

Any heirlooms, artwork,
jewellery or any collections
of special note and value

Any household goods and
furniture of special note
and value

TOTAL VALUE OF
ASSETS

TOTAL VALUE OF DEBTS

APPROX. NET VALUE OF
ESTATE

This document is NOT a Will. Lawyer consultation is recommended to prepare a proper Legal Will. Make several certified copies, one for your Estate Administrator and the original to be kept in a secure location accessible to your Estate Administrator.

© Wilhaven National, Inc. 2014