



Colin S. Ritchie



Will Questionnaire

Background Details – please provide full names and all alternate names used for people listed, as well as any names they commonly use

Your Name(s):

Place of citizenship:
Country of residence:
Marital status:

Date and Place of Birth (city, province, country):

Your Current Address:

Email address(es) and contact numbers:

Do you have any frozen reproductive material? Yes No

Are you paying any custody or support? If so, please provide details. Yes No

Do you have a prior Will Yes No

Children's names & birthdates, places of birth and current address:

Also, please indicate any of the following if applicable: and

- Citizenships of other countries;
- Any reasons (e.g. health problems, special needs, additions) that affect their ability to manage any inheritance?

Your Executor(s), and their addresses, places and dates of birth (if not previously provided):

Backup Executor(s) and their addresses, places and dates of birth (if not previously provided):

Executor / Trustee Fees. Do you want your executors to be able to claim a fee?

Yes No

Children's Guardian(s) & their address(es), place(s) and date(s) of birth:

If you name a couple, do you want one person to do the job if the other has died or the couple has split up?

Backup guardian(s) and their address(es), places and dates of birth:

If you name a couple, do you want one person to do the job if the other has died or the couple has split up?

Do you want anything in your Will regarding guardian expenses? If so, indicate this and we can discuss this further.

Yes

No

Details of your Estate – please provide details to any question to which you answered “yes”.

Details of any insurance policies on your lives, including company, amount and beneficiary (bringing the most recent statement is recommended)

Details of any investments, such as RRSPs, RRIFs, TFSAs, Pensions, IPPs, segregated funds, annuities etc. that allow you to name beneficiaries, including type of asset, amount and named beneficiaries

Do you own any RESPs?

Yes

No

Are all your non-registered assets of any type owned jointly?

Yes

No

Antiques, Collectibles, Tools, Furniture and other personal items of particular value?

Yes

No

Are you expecting a sizable inheritance or significant improvement in your financial situation in the future? If so please provide, details.

Yes

No

Do you already receive money from a trust and can you pick who gets it on your death?

Yes

No

Details of your Estate –

Do you own a home? If so:

If so,

- Address (if not provided previously)?
- Value?
- Mortgage balance?
- Any mortgage insurance on the property?

Additional recreation property you want to pass along in rather than sell? If so,

- Address?
- Value?
- Mortgage balance?
- Any mortgage insurance on the property?

Details of any additional real estate:

- Address?
- Value?
- Mortgage balance?
- Mortgage Insurance?

Distributing Your Estate

Personal Possessions and Similar Assets – I usually deal with these items by stating that you can prepare a memo detailing any specific gifts.

Any specific instructions for antiques, artwork, collectibles, tools, jewellery, vehicles, boats, sports equipment and the like of more significant value?

Do you want any personal items not mentioned in a separate memo to go to your spouse?

Yes
No (indicate the alternative)

Do you want any non-memo items distributed equally among your kids if no spouse?

Yes
No (indicate the alternative)

Cash or Asset Gifts

Details of any assets other than personal items that you wish to gift to specific people or charities. For things like cabins, provide as much detail as necessary

Details of any cash gifts you would like to make. Do you want these gifts indexed to inflation?

Dividing the Residue (the remaining balance of your estate after deducting all prior debts and expenses and paying out any of the specific gifts just noted).

If married, does everything go to a surviving spouse?

Yes
No (provide details of how you want things distributed.)

NA

If you leave behind children but no spouse, does everything go to them? **If there is any reason why you don't want to leave equal shares to your kids (e.g. younger children still requiring support, education, special needs children, prior gifts, alienation), please provide details.**

Yes
No (provide details of how you want things distributed.)

NA

At what age or ages do you want your children or younger heirs to manage their own money? Some people prefer gifting in stages (e.g. 10% at 25, 30% at 30 and the rest at 35).

Do you want provisions to delay any distribution to any heirs if it is in their best interests (addiction, health issues or incapacity, creditor concerns, divorce)

Yes No

If a child dies before you, what do you want to happen to his share in different situations, if survived by:

- a) a spouse, descendants and siblings
- b) descendants, siblings
- c) spouse, siblings
- d) spouse, descendants
- e) spouse only

Who do you want to inherit if there is a “**common disaster**” that wipes out the people that you’d otherwise want to inherit? Some spouses compromise and leave 50% to each of their respective families in each of their Wills so that one family isn’t inadvertently left out if the both die within a relatively short period.

Please provide names (and, addresses, places and dates of birth for anyone not already mentioned).

Any creditor, matrimonial, money-management, health or other concerns (i.e. substance abuse issues) regarding your children or other major heirs that would affect their ability to manage money or what you leave behind for them?

Are there any additional factors affecting your life that complicate your estate plans, such as creditor concerns, worries about people challenging your Wills, blended family issues, health challenges for either spouse?

Additional Instructions or Complications.

Do you want to set up educational funds for your heirs, funds for the care of family pet funds or for similar purposes? Please provide details.

Any prior gifts to children, debts owing from them? If so, are they to be taken into account in your Will or forgiven. Please provide details.

Any property in other countries or provinces? If so, what and do you have a Will in that jurisdiction?

Any time shares? Provide all the relevant info and what you would like to happen to them.

Funeral Information and Related Issues

Any burial, cremation or funeral requests?
(such location, denomination

Do you want a wake or any other special event?

Elaborate, simple or no service. Any specific features?

Any charity or donation you want mourners to donate to instead of providing flower?

Any coffin requests, even if only to say 'inexpensive.'

Do you have any special instructions for your ashes or for where you wish to be buried?

Anything else on this issue?

Donating Organs or Your Body

Indicating your wishes regarding these matters should really be done before death rather than in your Will. If you wish to do either of these things, I suggest visiting the sites attached below. If you do wish to donate organs, doing so through the organ registry links your intentions to your health care card. When you die, the hospital enters this number on their computer and your donor wishes can be accessed through the registry at this time before it is hopefully too late to act!

- [Organ Donation Registry Site](#)
- [UBC's body donation program](#)