

**PERSONAL**

- 1. Full Name: \_\_\_\_\_
- 2. Birth Date and Place: \_\_\_\_\_
- 3. Occupation: \_\_\_\_\_
- 4. Spouse's Name: \_\_\_\_\_
- 5. Spouse's Birth Date and Place: \_\_\_\_\_
- 6. Date and Place of Marriage: \_\_\_\_\_
- 7. Is there a marriage contract or domestic contract?  Yes (*if so provide copy*)  
 No
- 8. Address: \_\_\_\_\_  
\_\_\_\_\_

9. Contact information:

- a. Telephone number (H): \_\_\_\_\_
- b. Telephone number (W): \_\_\_\_\_
- c. Cell phone number: \_\_\_\_\_
- d. Email address: \_\_\_\_\_

10. Children of present marriage (*if disabled indicate the nature of the disability*)

<u>Full Name</u>	<u>Date of Birth</u>	<u>Disability</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

11. Previous Marriage by either spouse (*if so particulars of which spouse*):

- a. Date and Place of Divorce: \_\_\_\_\_
- b. Name of Previous Spouse: \_\_\_\_\_
- c. Children of Previous marriage (*if disabled indicate the nature of the disability*)

<u>Full Name</u>	<u>Date of Birth</u>	<u>Disability</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

12. Other dependents (*parents, brother or sister etc.*)

<u>Full Name</u>	<u>Date of Birth</u>	<u>Age</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

**FINANCIAL**

**ASSETS**

- 1. Do you own a house:  Yes  No
- Location: \_\_\_\_\_
- Registered in the name of: \_\_\_\_\_
- Purchase Price: \_\_\_\_\_
- Date of Purchase: \_\_\_\_\_
- Current Value: \_\_\_\_\_
- Present Mortgage Amount: \_\_\_\_\_
- Is this a matrimonial home:  Yes  No

2. Do you own other properties:

Location: \_\_\_\_\_

Registered in the name of: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Date of Purchase: \_\_\_\_\_

Current Value: \_\_\_\_\_

Present Mortgage Amount: \_\_\_\_\_

3. Personal Effects (*ownership and approximate value*):

a. Furniture:

\_\_\_\_\_  
\_\_\_\_\_

b. Automobiles and other vehicles/boats:

\_\_\_\_\_  
\_\_\_\_\_

c. Special Collections, Heirlooms, Artwork, Jewelry:

\_\_\_\_\_  
\_\_\_\_\_

4. Investments (*include names and values*):

a. Stocks and Shares in public/private companies:

\_\_\_\_\_  
\_\_\_\_\_

b. Canada Savings Bonds:

\_\_\_\_\_  
\_\_\_\_\_

c. Other Bonds, GIC's and Term Deposits:

\_\_\_\_\_

d. Miscellaneous:

---

---

---

5. Small Business/Sole Proprietorship:

- a. Name of Business: \_\_\_\_\_
- b. Type of Business: \_\_\_\_\_
- c. Value: \$ \_\_\_\_\_

6. Pension Plans:

- |                 | Beneficiary Designation | Company: |
|-----------------|-------------------------|----------|
| a. Pension Plan | _____                   | _____    |
| b. R.R.S.P.     | _____                   | _____    |
| c. C.P.P.       | _____                   | _____    |
| d. Other Plans  | _____                   | _____    |

7. Life Insurance:

- | a. Group Insurance | Beneficiary Designation | Death Benefit |
|--------------------|-------------------------|---------------|
| Company            | _____                   | _____         |

Is there any cash surrender value of the policy? [ ] Yes [ ] No

- | b. Personal | Beneficiary Designation | Death Benefit |
|-------------|-------------------------|---------------|
| Company     | _____                   | _____         |

Is there any cash surrender value of the policy? [ ] Yes [ ] No

8. Banking

- | a. Accounts held jointly: | Location | Approximate Amount |
|---------------------------|----------|--------------------|
| Name of Bank              | _____    | _____              |

- | b. Accounts held personally: | Location | Approximate Amount |
|------------------------------|----------|--------------------|
| Name of Bank                 | _____    | _____              |

- | c. Accounts in spouse's name: | Location | Approximate Amount |
|-------------------------------|----------|--------------------|
| Name of Bank                  | _____    | _____              |

d. Safety Deposit Box:

Name of Bank

Location

Registered Name/Box #

---

---

---

9. Other Assets:

---

---

---

---

**DEBTS**

1. List all debts and liabilities including mortgages:

Creditor

Principle and Liabe Amount

Interest

Maturity

---

---

---

---

---

**CURRENT ESTATE PLANNING DOCUMENTS**

- 1. Do you and your spouse have a Will?  Yes  No
- 2. Do you and your spouse have Powers of Attorney?
  - a. Personal:  Yes  No
  - b. Property:  Yes  No
- 3. Have you set up one of the following Trusts?
  - a. Family Trust  Yes  No
  - b. Insurance Trust  Yes  No
  - c. Hansen Trust  Yes  No
  - Other \_\_\_\_\_  Yes  No