

## CLIENT INFORMATION SHEET | PREPARING TO DRAFT A WILL

### PERSONAL INFORMATION

FULL NAME (AS ON DRIVER'S LICENSE OR PASSPORT): \_\_\_\_\_

ANY OTHER NAMES COMMONLY USED: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NUMBERS: HOME \_\_\_\_\_ WORK \_\_\_\_\_ CELL \_\_\_\_\_

HOME EMAIL: \_\_\_\_\_ DATE OF BIRTH (DD/MM/YYYY): \_\_\_\_\_

OCCUPATION: \_\_\_\_\_ NAME OF EMPLOYER: \_\_\_\_\_

MARITAL STATUS: \_\_\_\_\_

DETAILS OF DIVORCE/SUPPORT ORDERS, MARRIAGE CONTRACTS (PLEASE PROVIDE COPY AT MEETING):

\_\_\_\_\_

ANY EXISTING MEDICAL CONDITIONS:

\_\_\_\_\_

\_\_\_\_\_

NAME AND CONTACT INFORMATION FOR ACCOUNTANT/ FINANCIAL/INSURANCE ADVISOR(S):

\_\_\_\_\_

### INFORMATION ABOUT SPOUSE/PARTNER

FULL NAME (AS ON DRIVER'S LICENSE OR PASSPORT): \_\_\_\_\_

ANY OTHER NAMES COMMONLY USED: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE NUMBERS: HOME \_\_\_\_\_ WORK \_\_\_\_\_ CELL \_\_\_\_\_

HOME EMAIL: \_\_\_\_\_ DATE OF BIRTH (DD/MM/YYYY): \_\_\_\_\_

OCCUPATION: \_\_\_\_\_ NAME OF EMPLOYER: \_\_\_\_\_

MARITAL STATUS: \_\_\_\_\_

DETAILS OF DIVORCE/SUPPORT ORDERS, MARRIAGE CONTRACTS (PLEASE PROVIDE COPY AT MEETING):

\_\_\_\_\_

ANY EXISTING MEDICAL CONDITIONS:

\_\_\_\_\_

\_\_\_\_\_

NAME AND CONTACT INFORMATION FOR ACCOUNTANT/ FINANCIAL/INSURANCE ADVISOR(S):

\_\_\_\_\_

### CHILDREN & DEPENDANTS

NAME	DATE OF BIRTH (DD/MM/YYYY)	ADDRESS

ANY DISABILITY ISSUES:

\_\_\_\_\_

\_\_\_\_\_

ARE YOU CURRENTLY SUPPORTING ANYONE? IF SO, PLEASE PROVIDE DETAILS:

\_\_\_\_\_

\_\_\_\_\_

### ASSETS

#### SAFETY DEPOSIT BOX

LOCATION	NUMBER	REGISTERED NAME	LOCATION OF KEY

#### REAL ESTATE

##### PRINCIPAL RESIDENCE

ADDRESS: \_\_\_\_\_

NAME(S) ON TITLE (PROVIDE COPY): \_\_\_\_\_

CURRENT MARKET VALUE: \_\_\_\_\_

MORTGAGES: \_\_\_\_\_

##### ADDITIONAL PROPERTIES

ADDRESS: \_\_\_\_\_

NAME(S) ON TITLE (PROVIDE COPY): \_\_\_\_\_

CURRENT MARKET VALUE: \_\_\_\_\_

ACQUISITION COST AND DATE: \_\_\_\_\_

MORTGAGES: \_\_\_\_\_

**INSURANCE, ANNUITIES, RRSPS, RRIFs, DPSPS & PENSIONS**

NO. OF POLICY	ISSUED BY	BENEFICIARY	VALUE

**MONEY ON DEPOSIT**

BANK	TYPE & NUMBER of ACCOUNT	OWNERSHIP	VALUE

**SHARES, BONDS, DEBENTURES, GIC'S**

TYPE	ACQUISITION COST & DATE	CURRENT VALUE	LOCATION

ARE THERE ANY RESTRICTIONS ON TRANSFERS, SHAREHOLDERS AGREEMENTS ETC?

**INTEREST IN PARTNERSHIPS OR UNINCORPORATED BUSINESS**

**DEBTS OWING OR PROMISSORY NOTES**

**AUTOMOBILES, BOATS ETC**

**HEIRLOOM ITEMS COLLECTIONS**

**HOUSEHOLD GOODS & FURNITURE**