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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
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MONEY ON DEPOSIT

BANK	TYPE & NUMBER of ACCOUNT	OWNERSHIP	VALUE
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SHARES, BONDS, DEBENTURES, GIC'S

TYPE	ACQUISITION COST & DATE	CURRENT VALUE	LOCATION
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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
