

BRADFORD RATHBORNE LAW

WILLS INFORMATION

TESTATOR:

Name: _____ aka _____

Address: _____ Postal Code: _____

Occupation: _____

Relationship Status: _____

Telephone: (Home) _____ (Work) _____

Email: _____

Date of Birth: _____

Place of Birth: _____

Date of previous will: _____

Where previous will kept: _____

Where this will shall be kept: _____

TESTATRIX:

Name: _____ aka _____

Address: _____ Postal Code: _____

Occupation: _____

Relationship Status: _____

Telephone: (Home) _____ (Work) _____

Email: _____

Date of Birth: _____

Place of Birth: _____

Date of previous will: _____

Where previous will kept: _____

Where this will shall be kept: _____

RETAINER: \$ _____

EXECUTOR/EXECUTRIX:

Name: _____ aka _____

Relationship: _____

Address: _____ Postal Code: _____

Name: _____ aka _____

Relationship: _____

Address: _____ Postal Code: _____

ALTERNATIVE EXECUTOR/EXECUTRIX:

Name: _____ aka _____

Relationship: _____

Address: _____ Postal Code: _____

Name: _____

Relationship: _____

Address: _____ Postal Code: _____

CHILDREN:

Name: _____ Date of birth: _____

Name: _____ Date of birth: _____

Name: _____ Date of birth: _____

Name: _____ Date of birth: _____

GUARDIAN(S):

Name: _____ aka _____

Relationship: _____

Address: _____ Postal Code: _____

ALTERNATIVE GUARDIAN(S):

Name: _____ aka _____

Relationship: _____

Address: _____ Postal Code: _____

ASSETS AND FINANCIAL INFORMATION:

Real Estate: (yes/no) _____

Vehicles: (yes/no) _____

Business Interests: _____

Bank Accounts: _____

Securities, Bonds, Shares: _____

Life Insurance Policy: _____

Pension Plan & Annuities: _____

RRSP & RRIF: _____

TFSA: _____

Interests in any existing estates or trusts: _____

Liabilities: _____

SPECIFIC BEQUESTS: (personal effects & cash legacy)

1) _____

2) _____

3) _____

4) _____

REMAINDER:

1) All to Spouse: (yes/no) _____

2) Divide equally among surviving children: (yes/no) _____

3) Other:

COMMON ACCIDENT:

SPECIAL CLAUSES:

A) Age when minor beneficiaries take share: _____

As each turns: _____ or when youngest turns _____

B) Minor's shares:
a. To be held by Trustee _____
b. To be paid into Court pursuant to S. 84.1(1) _____
c. To be paid to surviving parent or guardian _____

C) Investment Clause for trustee: (yes/no) _____

D) Payment clause to or for minors: (yes/no) _____

E) Cremation: (yes/no) _____

F) Special funeral considerations: _____

REPRESENTATION AGREEMENT: (yes/no) _____

POWER OF ATTORNEY: (yes/no) _____

HEALTH CARE DIRECTIVE: (yes/no) _____

Wills Notice Registry: (yes/no) _____

Send draft via: Regular Mail Email Pick Up

Bill amount quoted: \$ _____, including fees, disbursements and taxes.