

WILL INFORMATION WORKSHEET

Use this information sheet to assist the legal advisor in preparing your Will.

A. Mr. Mrs. Ms. Miss _____
Address _____
Marital Status Single Married Divorced Widowed
Birth date _____ Tel. # _____ Social Insurance # _____
day/month/year

B. Immediate family (spouse, children, parents, and others):

Mr. Mrs. Ms. Miss _____ Relationship _____
Address _____
Birth date _____ Tel. # _____ Social Insurance # _____
day/month/year

Mr. Mrs. Ms. Miss _____ Relationship _____
Address _____
Birth date _____ Tel. # _____ Social Insurance # _____
day/month/year

Mr. Mrs. Ms. Miss _____ Relationship _____
Address _____
Birth date _____ Tel. # _____ Social Insurance # _____
day/month/year

Mr. Mrs. Ms. Miss _____ Relationship _____
Address _____
Birth date _____ Tel. # _____ Social Insurance # _____
day/month/year

C. How I want my estate distributed in the following scenarios:

- 1. If I am survived by my spouse _____ % to spouse _____ % other _____ % ministry
- 1. If my spouse is not living _____ % to children _____ % other _____ % ministry
- 1. If I am single, or in the event of a common disaster _____ % other _____ % ministry

D. Specify individuals from section "C":

Name	Address	Relationship	% or Amount
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

E. Specify organizations from section "C":

Name	Address	% or Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____

F. I want the following person or organization to be the executor of my estate.

Name of Executor _____ Address _____

Alternate Executor _____ Address _____

G. I want the following person(s) to be guardian(s) of my minor children:

Name(s) of Guardian(s) _____ Address _____

Alternate Guardian(s) _____ Address _____

H. I would like to include a graduated trust fund for my children that pays out the capital of their inheritance gradually through their early adulthood. Provide details:

I. Additional information for my legal advisor:

1. Copy of my present Will

2. _____

J. Contact your legal advisor for the preparation of your Will. If you do not have a legal advisor, ask your family, friends, or your pastor for a referral, or request a referral from Christian Legal Fellowship at **christianlegalfellowship.org** or **905.332.0597**. Once you have a contact, call their offices and ask:

- What is involved or required to have a Will drafted?
- How much time will it take?
- How much will it cost?

You may ask them about having an Enduring Power of Attorney document drafted and a Personal Health Directive drawn up. These documents address issues that arise if you can't make decisions for yourself and enable you to appoint others to serve on your behalf.