

Worksheet 5

My will, designations, digital assets, and the documents I leave my executor

Goes with: Chapter 10

One place for your executor to start. Do not write passwords or full account numbers on this sheet; say where that information is kept instead.

Name	Date completed

My estate plan on one page

Answer as far as you can before you meet your lawyer. The blanks are what the meeting is for.

The question	My answer, or what I need to find out
What do I own, and what do I owe?	
What tax will be due at my death?	
What goes through my will, and what passes outside it?	
Do my beneficiary designations still match my plan?	
Should I give anything away while I am alive?	
Does anyone need a trust or extra protection?	
Do I own a farm, a business or a company?	
Does my family know what I mean by fair?	

What I own	What, and to whom?	Who owns or controls it?	When: life or death?	How: will, designation, joint, trust, insurance?

What I own	What, and to whom?	Who owns or controls it?	When: life or death?	How: will, designation, joint, trust, insurance?

A. My documents

Document	Date signed	Prepared by	Original kept where
Will			
Codicil or new will			
Enduring power of attorney			
Personal directive			
Marriage, cohabitation or prenuptial agreement			
Letter of wishes			
Funeral contract			

B. My executor

Executor	Telephone or email	Agreed to act? (yes or no)
Alternate executor	Telephone or email	Agreed to act? (yes or no)

C. Beneficiary designations

These pass outside your will. Check that each one matches your plan.

Plan or policy	Institution	Beneficiary or successor holder	Date checked	Matches my will?
RRSP or RRIF				
TFSA				
Workplace pension				
Life insurance				
Other				

D. Where I bank and invest

Institution	Type of account or policy	Last 4 digits	Contact

E. Digital assets

Account or device	What it holds	Where the access information is kept

F. Other papers my executor will need

Item	Kept where
Birth and marriage certificates	
Social Insurance Number record	
Recent tax returns and notices of assessment	
Property deeds and titles	
Vehicle registrations	
Safety deposit box and key	
Share certificates or precious metals	

Item	Kept where
Debts and loans I co-signed	

Checklist (Chapter 10)

- ☐ I have a will, an enduring power of attorney and a personal directive
- ☐ My will has been reviewed since my last major life change
- ☐ My beneficiary designations match my will
- ☐ My executor knows where the original will is
- ☐ My executor has agreed to act, and I have named an alternate
- ☐ No one who receives a gift under my will, or their spouse or partner, witnessed it
- ☐ I have named a trustee for my grandchild in my will, and asked my lawyer how a guardian would be put in place if I cannot care for the child
- ☐ I have given my lawyer my reasons for leaving a child out or giving less, at a meeting on my own, and signed a statement of those reasons
- ☐ I know whether any part of my estate falls under the Indian Act or Métis Settlement rules, and whom to contact