

Legal Will information collection Worksheet

The following information should be collected prior to completing the service at www.legalwills.ca or if you are planning to step through the service on behalf of another person.

This is not a Will. It is simply a way of collecting information that can then at a later time be entered into the service at www.legalwills.ca

To create a legal Last Will and Testament, you should go to www.legalwills.ca and click on “Try it Now” in the centre of the home page. At any point through the service you can save the information entered (or wait until the end). At which point you will be prompted to create an account with a User ID and Password. You can also pay for the service at this time. The account details must have a unique combination of first name, last name and email address, so you can use the same email address for multiple accounts. The User ID for each account must be unique.

Once you have completed the service you will be able to download and print the document. If the Will is being prepared for somebody else, this should then be handed to the Testator (the person for whom the Will is being created). The testator must be able to understand the contents of the document and it must reflect their wishes. To make the document a legal Last Will and Testament it must be signed in the presence of two witnesses who must then sign. The witnesses can be any competent adults who cannot benefit from the contents of the Will (they cannot be beneficiaries or the spouse of a beneficiary).

Once the document is signed and witnessed, it should be kept in a safe place that will be accessible to the Executor at the appropriate time.

If you have any questions, please email the team at support@legalwills.ca

Basic information

Full name of person needing the Will (the Testator):

Address:

Marital Status:

Children (name, gender, Date of Birth):

Grandchildren (name, gender, DoB if known):

Deceased family members (name, relationship):

Guardians for Minor Children (child's name, guardian's name, alternate if first choice cannot serve):

Executor; person who will carry out the instructions in the Will (name, relationship, address):

Alternate Executor; in case first choice cannot serve (name, relationship, address):

Instructions for the distribution of the estate

Specific Gifts (include detailed description, beneficiary and alternate beneficiary)

Distribution of remaining estate after taxes, expenses and specific gifts have been disbursed (including alternate plan in case first choice plan cannot be fulfilled)

Trusts for children (list name of minor child and age at which child should receive their inheritance or portions of the estate e.g. 1/3 at 21, 1/3 at 25, the remainder at 30)

Describe any debts that should be forgiven as part of the Will if any

Additional notes
