



## Will Information Worksheet

### Getting Ready to Write your Will

Legal**Wills**  
CANADA



# The Will Writing Business

**Congratulations on taking this important step forward, getting started really is the hardest part!**

Before you can finally check this important item off your to-do list you'll first need to ensure you have key details on hand. We don't want to send you on a scavenger hunt mid-process, so this worksheet will help you organize everything in advance.

## **First things first, a quick disclaimer:**

This is NOT your actual Will. It's simply a guide to help you organize your information so that once you start the process online, you're ready to rock and roll! Once armed with your filled out worksheet, you'll be able to complete your own Will or assist someone in preparing theirs.

Our service over at [www.legalwills.ca](http://www.legalwills.ca) walks you through the entire process step by step, allowing you to save your progress and return at any time. When you're done, you'll be able to download and print your Will, but to make your Will legally valid, you will need to sign it in the presence of two witnesses who are not beneficiaries (or spouses of beneficiaries).

## **If you have any questions, our team is here to help!**

Reach out to us at [support@legalwills.ca](mailto:support@legalwills.ca) or explore the resources on our website. With over 25 years of experience, we've likely answered every question you can think of! Our sole goal is to make this process as simple and stress-free as possible.

**Now that we've gotten that out of the way, let's get started!**

## TESTATOR – WHO IS THE WILL BEING WRITTEN FOR?

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Gender: \_\_\_\_\_ Marital Status: \_\_\_\_\_

## SPOUSE/PARTNER (IF APPLICABLE):

Full Name: \_\_\_\_\_

Relationship: \_\_\_\_\_ Gender: \_\_\_\_\_

## CHILDREN (IF APPLICABLE):

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

## GRANDCHILDREN (IF APPLICABLE):

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

Full Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Gender: \_\_\_\_\_

## BLENDED FAMILY?

You or your spouse/partner have children from a previous relationship?

☐ Yes ☐ No

## IF YES, CHOOSE ONE OF THE FOLLOWING

- ☐ Leave everything to my spouse/partner "in trust," for later distribution to my children.
- ☐ Leave everything to my children, but provide a "life interest" in my home to my spouse/partner.
- ☐ Neither of these.

**EXECUTOR** (PERSON WHO WILL CARRY OUT YOUR WISHES IN THE WILL):

Full Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

**ALTERNATE EXECUTOR** (IN CASE YOUR FIRST CHOICE IS UNABLE TO SERVE)

Full Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

**SECOND ALTERNATE EXECUTOR** (IN CASE YOUR FIRST CHOICE IS UNABLE TO SERVE)

Full Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

**GUARDIANS FOR MINOR CHILDREN** (IF APPLICABLE):

Child's Name: \_\_\_\_\_

Guardian's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason for Choosing Guardian: \_\_\_\_\_

\*Guardian's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason for Choosing Guardian: \_\_\_\_\_

\* Alternate Guardian – if first choice is unable to serve:

Child's Name: \_\_\_\_\_

Guardian's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason for Choosing Guardian: \_\_\_\_\_

\*Guardian's Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Reason for Choosing Guardian: \_\_\_\_\_

\* Alternate Guardian – if first choice is unable to serve:



**SPECIFIC GIFTS**

- Items, Property, or Money Left to Specific People or Organizations.
- Include details such as descriptions, names, and relationships.

Gift: \_\_\_\_\_

Gift: \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Beneficiary: \_\_\_\_\_

Alternate Beneficiary: \_\_\_\_\_

Alternate Beneficiary: \_\_\_\_\_

Details: \_\_\_\_\_

Details: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**CHARITABLE DONATIONS (OPTIONAL)**

- If you wish to leave a donation to a charity, please provide:

Full Name of Charity: \_\_\_\_\_

Full Name of Charity: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Type of Donation

Type of Donation

- Money, Specific Item, Percentage of Estate

- Money, Specific Item, Percentage of Estate

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**ARRANGEMENTS FOR PETS (OPTIONAL)**

- If you have pets, you may wish to include care instructions. Please provide:

Pet's Name: \_\_\_\_\_

Species/Breed: \_\_\_\_\_ Birth Date or Year: \_\_\_\_\_

Life Expectancy (if known): \_\_\_\_\_ Expected Annual Care Cost: \_\_\_\_\_

Primary Caregivers Name: \_\_\_\_\_

Alternate Caregivers Name: \_\_\_\_\_

*\*If first choice is unable to serve*

**DISTRIBUTION OF REMAINING ESTATE**

- *This is usually the main beneficiary of your estate*
- *After debts, expenses, and specific gifts have been distributed, who will receive the rest of your estate?*

Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Alternate Plan:

- *If your first choice cannot inherit, who should receive their portion?*

\_\_\_\_\_  
\_\_\_\_\_

**TRUSTS FOR CHILDREN**

- *If leaving an inheritance to minors, at what ages should they receive it?*
- *Example: 1/3 at age 21, 1/3 at age 25, and the remainder at 30*

Name of Minor: \_\_\_\_\_

Age at which they should receive inheritance and amount:

\_\_\_\_\_  
\_\_\_\_\_

Name of Minor: \_\_\_\_\_

Age at which they should receive inheritance and amount:

\_\_\_\_\_  
\_\_\_\_\_

Name of Minor: \_\_\_\_\_

Age at which they should receive inheritance and amount:

\_\_\_\_\_  
\_\_\_\_\_

**FORGIVENESS OF DEBT**

- *If you wish to forgive any debts owed to you, list them here*

Name of Debtor: \_\_\_\_\_

Amount & Details: \_\_\_\_\_

# And that's it!

**Congratulations on completing your worksheet – we know gathering all that information can be cumbersome. You're now officially ready to write your Will.**

## **What Now?**

You are now ready to enter all of this information into our online Will writing service over at [www.LegalWills.ca](http://www.LegalWills.ca). If you're assisting someone else, please ensure that they fully understand and agree with the information provided.

*You're on your way to completing one of the most important documents of your life, so give yourself a pat on the back – you deserve it.*



**LegalWills**  
*You DECIDE. ®*

## Contact Us

### **ADDRESS**

2420 Bank Street, Suite 45, Ottawa, Ontario, K1V 8S1

### **PHONE**

1-888-660-WILL

### **WEBSITE**

[LegalWills.ca](http://LegalWills.ca)

### **EMAIL**

[Support@LegalWills.ca](mailto:Support@LegalWills.ca)

### **FACEBOOK**

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