



# NEW WEST NOTARY PUBLIC

TRADITION OF TRUST

Date \_\_\_\_\_, 20\_\_\_\_

**If you would like to create a Will, you may come in and we will assist you with the entire form completion or you may provide us with preliminary information by completing this form before you make an appointment.**

**Full legal name of Willmaker:** \_\_\_\_\_

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

Occupation: \_\_\_\_\_ Email: \_\_\_\_\_

Citizenship: \_\_\_\_\_ Daytime Phone No.: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Marital Status:      Single: \_\_\_\_\_ Married: \_\_\_\_\_

                                Common-law: \_\_\_\_\_ Divorced: \_\_\_\_\_

                                Separated: \_\_\_\_\_ Widowed: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_ Date of Divorce: \_\_\_\_\_

Do you have a Pre-nuptial Contract? Yes \_\_\_\_ No \_\_\_\_

Do you have a Separation Agreement? Yes \_\_\_\_ No \_\_\_\_

**Full legal name of Spouse (if applicable):** \_\_\_\_\_

Address (same, or): \_\_\_\_\_

Occupation: \_\_\_\_\_ Email: \_\_\_\_\_

Citizenship: \_\_\_\_\_ Daytime Phone No.: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

**Is this for identical Wills for each spouse?** Yes \_\_\_\_ No \_\_\_\_

(If Yes, and answers are identical, you need only complete one of these forms)

**Full legal names of all of your children, including adopted children and their ages:**

Name(s): (please provide legal names)

Age(s):

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## Estate Executor(s)

### Choosing Your Estate Executor

Choosing an Estate **Executor** is a critical part of preparing your Will. Not only is your Estate Executor responsible for all aspects of settling your estate – a process which can take up to two years or longer to resolve – but they can also be held personally liable for any errors that they make during the settling process.

Use the following **Executor Selection Checklist** to help you in choosing the right person:

#### They Have the Competence to Perform the Task well

You'll want to choose someone who is:

- a person who is trusted and smart
- savvy enough to deal with accountants, financial and legal advisors and to understand the information that they receive
- not easily overwhelmed, willing to ask tough questions and can manage money.

#### They Have the Time to Take on the Role

Make sure the person you choose has the time to do the work properly.

It can be physically demanding and mentally draining, not to mention the time it consumes.

Being an executor is basically equivalent to a part-time job that can take up to two years or more to complete.

#### They are Strong and Stable in Emotional Situations

It's essential not to underestimate the emotional element involved when a loved one passes away.

This is especially important if you choose a spouse or child as your Executor.

You must consider your loved one's objectivity and their ability to deal with issues rationally.

Family dynamics may simmer while parents are alive, but they can intensify when the first parent passes on.



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## They Are Not a Beneficiary of Your Estate

Some legal and financial professionals now deter Canadians from choosing their children as their Executors.

This is because in most cases children are also listed as beneficiaries.

While your children may seem like the most logical choice for your Executor(s), consider that you may be pitting them against each other during decision making and creating potential roadblocks for resolution.

## You Can Trust Them to Be Objective

The modern family dynamic is more varied and blended than ever before, and that has made estate planning more complicated.

Selecting a person who can remain objective gets more difficult as relationships get more complex, for example stepchildren can add to potential disputes among siblings.

## They Live Within a Manageable Distance

Appointing a non-resident to be your **Executor** can lead to negative consequences.

Consider a **Co Executor** to assist your **Executor** and an **Alternate Executor** to step in if one of your Executors' is not available.

Person you wish to be your **Executor**:

(please provide legal names)

Spouse, Yes \_\_\_\_ or,

Name: \_\_\_\_\_ Relationship to Willmaker: \_\_\_\_\_

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

Person you wish to be your **Alternate Executor**:

(please provide legal names)

Name: \_\_\_\_\_ Relationship to Willmaker: \_\_\_\_\_

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



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## DIVISION OF ESTATE

If you die, who will the estate go to/ how will it be divided?

All to spouse: Yes \_\_\_\_ No \_\_\_\_:

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## IF YOU AND YOUR SPOUSE DIE:

Full name of person you wish to be **Guardian** of any children under 19 (if applicable):

Name: \_\_\_\_\_ Relationship to Willmaker: \_\_\_\_\_

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

Who will estate go to/how will it be divided? To children equally? Yes \_\_\_\_ No \_\_\_\_  
if No, to:

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If you have a child(ren), and one of them dies before you, who does their share of your Estate go to? To his/her children equally? Yes \_\_\_\_ No \_\_\_\_ if No, to:

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If you have a young family and you travel together, indicate amongst whom you wish your estate to be divided if your entire immediate family dies:

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Do you have any funeral or burial wishes that you would like mentioned in your Will? If so, what are your wishes?

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Address of where you will keep your original Will after signing? (We recommend a safety deposit box at a financial institution)

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Do you have any assets located outside of British Columbia? Yes \_\_\_\_\_ No \_\_\_\_\_

**Have you prepared an Enduring Power of Attorney or a Representation Agreement to allow someone to conduct your affairs in the event you become mentally incapable while you are alive? An Advanced Directive?**

**Power of Attorney**

Yes \_\_\_\_\_ No \_\_\_\_\_

**Representation Agreement**

Yes \_\_\_\_\_ No \_\_\_\_\_

**Advanced Directive**

Yes \_\_\_\_\_ No \_\_\_\_\_

I would like more information: Yes \_\_\_\_\_ No \_\_\_\_\_

In order for New West Notary Public to assist you with simple estate planning advice, they will ask you about your assets, their values and who owns them when you meet with New West Notary Public to talk about your Will instructions.

**COMPLETING THIS FORM DOES NOT MAKE A WILL. YOU MUST HAVE THE PROPER DOCUMENTS PREPARED BY NEW WEST NOTARY PUBLIC AND SIGNED IN THEIR OFFICE.**

**Would you like to get started?** Please contact New West Notary Public at 604-526-7884 or email [info@newwestnotary.ca](mailto:info@newwestnotary.ca)

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