

PERSONAL INFORMATION

Supplementary Information - Marital Agreements

[] Marriage or Domestic Contract Date: _____
Drawn up by: _____

Particulars of separation agreement / divorce decree / marriage contract:

Children and Issue

Name and Address:	Relationship	Marital Status	Birth Date (MM/DD/YY)
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Adopted Children:

Other Blood-Related Children:

Other Beneficiaries

Name and Address:	Relationship	Attained age of Majority (Yes/No)
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_____	_____	_____
_____	_____	_____
_____	_____	_____

Other than those individuals listed above, is the client providing support to any other person or is he/she under a legal obligation to support any other person? [] No [] Yes (describe below)

CLIENT ASSETS AND LIABILITIES

Inventory of Net Worth	Client Name Only	Spouse Name Only	Joint Ownership	Named Beneficiary Assets Outside of Will
Cash	\$	\$	\$	
Term Deposits & GICs				
Bonds				
Stocks				
Mutual Funds				
RRSP				
Beneficiary				
Beneficiary				
Registered Pension Plan				
RRIF or Annuity				
Beneficiary				
Beneficiary				
Life Insurance				
Type: _____ Beneficiary: _____				
Type: _____ Beneficiary: _____				
Spouse:				
Type: _____ Beneficiary: _____				
Type: _____ Beneficiary: _____				
Real Estate - Principal Residence				
Value: \$ _____ <input type="checkbox"/> Joint with spouse, or				
Mortgage: \$ _____ Mortgage Insurance: <input type="checkbox"/> Yes <input type="checkbox"/> No				
Net: \$ _____				
Real Estate - Other				
Nature:				
Location:				
Value: \$ _____ <input type="checkbox"/> Joint with spouse, or				
Mortgage: \$ _____ Mortgage Insurance: <input type="checkbox"/> Yes <input type="checkbox"/> No				
Net: \$ _____				
Personal Effects and Household Goods:				

CLIENT ASSETS AND LIABILITIES

Inventory of Net Worth <i>(cont'd)</i>	Client Name Only	Spouse Name Only	Joint Ownership	Named Beneficiary Assets Outside of Will
Automobiles, Boats, Etc.: _____	\$	\$	\$	
Private Loans, Mortgages or Notes: _____				
Business Interests Nature: _____ Buy Sell Agreement: <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	\$	\$	\$	
Other Assets: _____				
Prepaid Funeral Arrangements, Cemetery Plot Location:				
Total Assets				
Outstanding Loans or Other Debts				
Total Debts				
TOTAL NET WORTH				
Location of Personal Papers: _____				
Other Comments:				

INSTRUCTIONS

Required: **Client:** New Will Codicil Existing Will Dated: _____

Spouse: New Will Codicil Existing Will Dated: _____

Executor(s): _____

Indicate below how you would like your Household Goods and Personal Effects to be distributed:

<u>Items</u>	<u>Name & Address</u>	<u>Relationship to Client</u>
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Legacies and Special Bequests:

<u>Amount or Item</u>	<u>Name & Address</u>	<u>Relationship to Client</u>
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Instructions for Distribution of Residue after above Legacies and Special Bequests:
