



McIntosh & Pease
Barristers and Solicitors

Robert G. S. McIntosh, Q.C. 1928 – 2015
Edson (Ted) G. Pease, B.A. (Econ.), LL.B.
Certified specialist in Estates and Trusts Law

Estate Planning Questionnaire – Return Clients

Thank you for allowing us the opportunity to meet with you and update your documents. For the personal information sections on the first few pages you only need to advise as to any changes since we last prepared your documents; however, please update the Asset sections in detail so we have your current information on file.

Please deliver the completed questionnaire to our office prior to the meeting by hand, mail or fax. The information you provide is confidential so you may not want to scan/email it to us. Note that we will not be responsible for any damages you may incur if you communicate confidential information to us by email, or if we communicate such information to you by email, at your request.

FEES:

At the end of the meeting you will be provided with a fee quote for updating your estate planning documents. If all information and final instructions are not provided at the meeting an estimate will be given once they are received. We will not proceed until you have approved the estimate.

CONCLUSION:

Please call or email the office to arrange your initial consultation if one has not already been arranged.

McIntosh & Pease, Barristers and Solicitors
Edson (Ted) G. Pease
Law Society of Upper Canada Certified Specialist in Estates and Trusts Law

Date of Completion: _____

Name of person completing form: _____

Date of original documents: _____

Mail: P.O. Box 352, Brantford, Ontario N3T 5N3
Courier/In Person: 442 Grey Street, Suite D, Brantford, Ontario N3S 7N3 Telephone: 519-751-7518 Facsimile: 519-751-7526
GTA Office: 1595-16th Avenue, Suite 301 Richmond Hill, Ontario L4B 3N9 Telephone: 416-410-6468 Facsimile: 416-410-3300
Toll Free: 1-877-866-3654 E-mail: info@mcintosh-pease.com Web Site: www.mcintosh-pease.com

Please respond to Brantford office mailing address

FAMILY INFORMATION

	You	Your Spouse / Partner
Full Legal Name		
Name that you go by		
Date of Birth		
Citizenship		

CONTACT INFORMATION

	You	Your Spouse / Partner
Home address		
Home Phone		
Cell Phone		
Email		

EMPLOYMENT INFORMATION

	You	Your Spouse / Partner
Occupation		
Place of Employment		

MARRIAGE INFORMATION

We are () Married or () Common Law		
Date of marriage or commencement of living common law:		
Do you have a pre-nuptial or cohabitation agreement? Yes <input type="checkbox"/> No <input type="checkbox"/> Please provide a copy		
	You	Your Spouse / Partner
Previously married?		
Name of former spouse		
If spouse is deceased, please provide date of death		

OUR CHILDREN COMMON TO THE MARRIAGE

Full legal name	Date of Birth	Address

YOUR CHILDREN PRIOR TO MARRIAGE

Full legal name	Date of Birth	Address
Please provide a copy of any support obligations / Orders		

SPOUSE'S OR PARTNER'S CHILDREN PRIOR TO MARRIAGE

Full legal name	Date of Birth	Address
Please provide a copy of any support obligations / Orders		

INFORMATION ABOUT OTHER PERSONS WHO ARE NAMED IN YOUR ESTATE PLANNING DOCUMENTS (GRANDCHILDREN, SIBLINGS, PARENTS, NIECES, NEPHEWS, ETC.)

	You	Your Spouse / Partner
Full Name		
Date of Birth		
Address		
Relationship to you		
Full Name		
Date of Birth		
Address		
Relationship to you		

Are there any persons who you wish to be entitled to an interest in your estate that was born outside marriage and not later adopted? Yes No Please provide details.

	You	Your Spouse / Partner
Is there someone for whom you serve as legal guardian, or who is dependent upon you for financial support? Please provide details		
Does any person involved in your estate plan have any physical or emotional disability, or any urgent medical issues? Please provide details		
Have you been appointed as Executor for anyone's estate or as Attorney for Power of Attorney for Property for someone? Please provide details		

FINANCIAL CONTACTS

Name and phone number of accountant	
Name and phone number of investment advisor	
Name and phone number of banker	
Name and phone number of insurance advisor	
If necessary, may we speak to them about your estate planning?	

A. ASSETS

Real Estate (Principal Address)	
Street Address	
Name(s) on Title	
Joint Tenants ____ or Tenants in Common ____	
Current Market Value	
Mortgage and Line of Credit Details	
Current Equity	
Other Real Estate (cottage, rental property)	
Street Address	
Name(s) on Title	
Joint Tenants ____ or Tenants in Common ____	
Current Market Value	
Mortgage and Line of Credit Details	
Current Equity	

REGISTERED FUNDS (RRSPs, RRIFs, RESPs, TFSAs)		
	You	Your Spouse / Partner
Institution		
Type of Investment		

Current Value		
Designated Beneficiary		
Institution		
Type of Investment		
Current Value		
Designated Beneficiary		

NON-REGISTERED INVESTMENTS (Public Shares, Mutual Funds, Bonds, GICs)		
	You	Your Spouse / Partner
Institution		
Type of Investment		
Current Value		
Designated Beneficiary		
Institution		
Type of Investment		
Current Value		
Designated Beneficiary		

Total Value of Overall Portfolio	
You	Your Spouse / Partner
\$	\$

PRIVATE COMPANY SHARES

Name of Company _____

Who holds the shares? _____ Shares Held _____

Percentage of Issued Shares _____ Approximate Value \$ _____

Details of Buy/Sell Agreements - please provide a copy

PARTNERSHIP OR OTHER BUSINESS INTERESTS. PLEASE PROVIDE DETAILS:

Who holds the Interest? _____

Name of Business _____

Percentage of Interest _____ Value to Estate \$ _____

BANK INFORMATION		
	You	Your Spouse / Partner
Name of Bank		
Address		
Acct No.		
Name(s) on Account		
Account Balance		

Name of Bank		
Address		
Acct No.		
Name(s) on Account		
Account Balance		
Name of Bank		
Address		
Acct No.		
Name(s) on Account		
Account Balance		

SAFETY DEPOSIT BOXES	
Name on account	
Location of Box	
Location of Key	
Number of Box	
General contents and value	

LIFE INSURANCE		
	You	Your Spouse / Partner
Issued By		
Term or Whole Life (circle)		
Amount		
Beneficiary		
Issued By		
Term or Whole Life (circle)		
Amount		
Beneficiary		

OTHER ASSETS (please indicate type and approximate value)		
	You	Your Spouse / Partner
Land Mortgages		
Promissory Notes		
Loans to Others		
Automobiles		
Antiques		
Paintings		
Jewellery		
Boats/RVs/Trailers		
Expected Inheritances from others		
Other		

TOTAL ESTIMATED GROSS VALUE OF ASSETS	
You	Your Spouse / Partner
\$	\$

B. LIABILITIES

LOANS NOT PREVIOUSLY NOTED		
	You	Spouse / Partner
Creditor		
Maturity		
Monthly Payment		
Principal Amount Owing		
Creditor		
Maturity		
Monthly Payment		
Principal Amount Owing		
Guarantees of Debts of others		

TOTAL ESTIMATED GROSS VALUE OF LIABILITIES	
You	Your Spouse / Partner
\$	\$

NET WORTH (A-B)	
You	Your Spouse / Partner
\$	\$

ADDITIONAL INCOME		
	You	Your Spouse / Partner
Earned Income		
Dividend Income		
Earned Income		
Pension Income		
TOTAL		