

CHECKLIST

Disbursements are legal expenses that a lawyer passes on to a client, such as for photocopying, searching for documents, phone calls and messenger services. To prepare to have your Will drafted, you should gather some important and relevant personal and financial information and save on possible disbursement expenses.

This information, which is outlined on this checklist, will save you the cost of having your lawyer collect these materials. Make sure to keep copies for your own records.

Keep copies of all this information alongside your new Will to aid your trustee and beneficiaries, who won't have to be looking for hidden or hard to find assets and liabilities after you die.

The following basic information should be included in the checklist:

- **Personal Information:**
 - Your name and contact information (address, phone, email), date of birth
 - Are you a Canadian citizen?
 - Copies of previous Wills (if any)
 - Copies of any marriage contract, cohabitation agreement, or other spousal/common-law information

- **All family and dependent Information:**
 - Your marital status (past and present), (including common law),
 - Your spouse's name and contact information and date of birth
 - The names and personal information of all your children
 - The names and personal information of any/all dependants

- **Other bequest information:**
 - Charities you plan to provide for (if applicable). If you are leaving part of your estate to a registered charity, it is possible to arrange it so that the donation is applied to the tax return filed for the year of death or immediately prior year. This can offer tax advantages, but you should seek professional advice to make sure Canada Revenue Agency requirements are met.

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- **Previous will(s):**
 - Do you have an existing will?
 - Does your spouse have an existing will?
 - Have you set up a trust to benefit another person? (provide details).

- **Information regarding your professional advisors**
 - Provide the names and addresses of lawyer(s) accountant, investment advisor, life insurance agent, etc.;
 - Are you the executor of any other estate?

- **Any income information**
 - Current annual income from all sources such as employment, business, rent, royalties or other.

- **All asset information:**
 - Real estate (location and value)
 - In whose name is the real estate?
 - Automobiles, boats, household goods, furniture, machinery, tools, equipment etc.
 - Bank accounts, safety deposit boxes (location and in whose name?)
 - Bonds and /or shares
 - Foreign investments
 - Other valuables such as paintings etc.
 - Life insurance policies, annuities, RRSPs, RRIFs, RESPs, pensions and investment details
 - Any business interests and debts owing from third parties.

- **Any and all liabilities outstanding:**
 - Mortgages (amount owing and name of mortgagee)
 - Loans, credit card balances, other debts.

This tip sheet was prepared for CALC by Sharon Leitch, family law lawyer, and Judith Dale, from the Hastings County Law Association.

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