



MATTERS FOR CONSIDERATION FOR THE PREPARATION OF A LAST WILL AND TESTAMENT

1. Name of Testator/Testatrix

2. Address of Testator/Testatrix

3. Marital Status

- a. If presently unmarried, are you contemplating marriage?
- b. If presently married, are you contemplating divorce?

4. Do you have children?

- a. If so, please provide name, address and age of each child.
- b. Have you considered (i) appointing a guardian for any minor child (children); or (ii) creating a trust and appointing a trustee for any assets left for a minor child (children)?

5. Name, address and relation of Executor (that is the person responsible for ensuring that the wishes contained in your Will are carried out. Consider who this person will be carefully and be sure that this is a person whom you trust and will be responsible in carrying out the wishes contained in your Will)?

- a. Name, address and relation of alternate Executor in the event the person named above refuses or is unable to act?

N.B. If you wish for all of your property to be acquired by one person after your death, insert the name of that person here and ignore items 6 and 7 below.

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- 6. List particulars of all personal property (i.e. property which is not real estate) owned by you, including banks accounts, life insurance policies, vehicles etc. with the corresponding person (beneficiary) you wish to acquire such property after your death.**
 - a. Name, address and relation of alternate person(s) to acquire your personal property after your death in the event the person named above predeceases you.

- 7. List particulars of all real property (i.e. land, houses, buildings etc.) owned by you with the corresponding person (beneficiary) you wish to acquire such property after your death.**
 - a. Name, address and relation of alternate person(s) to acquire your personal property after your death in the event the person named above predeceases you.

- 8. Name, address and relation of residuary beneficiary (i.e. the person you wish to acquire any remaining assets not specifically disposed of above).**
 - a. Name, address and relation of alternate person(s) to acquire your residuary property after your death in the event the person named above predeceases you.