

Wealth Transfer

When did you last review and/or update your will?

What prompted you to do that?

What are your plans for the ultimate distribution of your estate?

How much of your estate is important to you? %

Have all these plans and wishes been clearly documented? Yes No

Of the part of your estate that you do not get to spend, where do you want that to go?

Are you aware of how estate taxes, administrative and settlement costs would be applied in your situation?

Would you be interested in seeing how you can pass more of your estate to your heirs or charities instead of the tax department?

Do any of your assets have named beneficiaries?

Which of your assets are jointly owned?

Asset:

Joint owners:

Asset:

Joint owners:

Asset:

Joint owners:

Are you providing, or thinking about providing, some form of gifting to children or grandchildren while you are living? If yes, has this been done or is this an area where suggestions are welcome?

If yes, please describe

Would you like to explore some suggestions and alternatives in this area? Yes No

Advisor notes, comments and recommendations