Planning for Special Needs Situations and People

Reset Form

Have you or your spouse been married previously?

Do either of you have children from previous relationships?

Your details:

Spouse/Partner details:

Are you legally married or is this a common-law arrangement?

Are there agreements, settlements, or personal objectives that affect your assets, pensions, or conditions of estate distribution? Please provide details. Include any business interests and associated agreements and conditions.

Do you presently provide support for any family members or do anticipate that this will happen in the future?

Are there any special needs situations involving children, grandchildren, parents or siblings for whom you would like to make special provisions now and/or in the future? Please provide details.

Have you had the opportunity to investigate the use of trusts for your assets and income needs while you and your spouse/partner are alive?

Have you had the opportunity to investigate the use of trusts for estate purposes?

Would you be interested in exploring the benefits of these vehicles as they might apply in your situation?

Are you aware of the deferred tax liability of your registered plans, like Registered Retirement Savings Plans (RRSPs), Registered Retirement Income Funds (RRIFs) and other retirement plans and arrangements?

Have you discussed your legacy and estate plans with your spouse/partner and your children?

Have appropriate wealth-transfer plans been put in place for your parents' assets?

Are there any special needs situations involving pets for which you would like to make special provisions now and/or in the future? Please provide details including funding.

Advisor notes, comments and recommendations