

# WILL PLANNER



Wycliffe  
College

# Will Planner

## INTRODUCTION

This Will Planner is designed to help you think about your estate's legacy and to prepare information needed for the completion of your Will. This is a very personal document, so share it only with people you choose to.

Having an estate plan can bring you some peace of mind. It can even help increase the value of what you wish to leave to family, friends, the Church and other charitable organizations. But more importantly, having this information here, in one place, is a great gift to your family and executor when they are called to carry out your wishes.

Do the best job you can today, knowing that additions or revisions can be made anytime. We hope you find this planner helpful.

### THIS IS THE WILL PLANNER OF:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

*For we brought  
nothing into this  
world, and it is  
certain we carry  
nothing out*

1 Timothy 6:7



# Will Planner

## PERSONAL INFORMATION

Date this information was prepared: \_\_\_\_\_

Do you have a Will?  Yes  No Date \_\_\_\_\_ Location \_\_\_\_\_

Does your spouse?  Yes  No Date \_\_\_\_\_ Location \_\_\_\_\_

Date of any earlier Will: \_\_\_\_\_ Where is this Will? \_\_\_\_\_

Who has access to it? \_\_\_\_\_

**Your Full Name:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Citizenship: \_\_\_\_\_ Social Insurance Number: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_

Employer Contact: \_\_\_\_\_ Employer Telephone: \_\_\_\_\_

**Marital status:**  Single  Married  Widowed  Divorced  Other

Is there a marriage contract or pre-nuptial agreement?  Yes  No

Date & Place of Marriage: \_\_\_\_\_

Previous Marriage: (Name / Date) \_\_\_\_\_

Previous Marriage: (Name / Date) \_\_\_\_\_

Divorce Granted: (Date / Papers Located) \_\_\_\_\_

Divorce Granted: (Date / Papers Located) \_\_\_\_\_

**Name of my Spouse:** \_\_\_\_\_

Address (if different from your own): Suite \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

# Will Planner

**Children:** Name, son(s) / daughter(s), address(es) and birth date(s) of your children to be named in your Will:

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**Relatives:** Name, address and birth date of immediate relatives to be named in your Will:

Mother: \_\_\_\_\_

Father: \_\_\_\_\_

Sibling: \_\_\_\_\_

Sibling: \_\_\_\_\_

Sibling: \_\_\_\_\_

Sibling: \_\_\_\_\_

**Other Relatives:** Name, address and birth date of other relatives (Le. grandchildren, cousins) to be named in your Will:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Friends:** Name, address, birth date of friends to be named in your Will:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Churches & Charitable Organizations:** Name, address, registration number of organizations to be named in your Will:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

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## CHILD GUARDIANS

If you have underage children, it is crucial that you name a child guardian in your Will. You should name a guardian and an alternate guardian that you trust with your child's care. Always discuss guardianship with the potential guardians before naming them in your Will. You may wish to provide extra money in your Will to help guardians take care of your children (e.g. home renovations).

**Guardian Name:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

**Alternate Guardian Name:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_



# Will Planner

## LEGAL & FINANCIAL DOCUMENTS

It is very important that your Executor / Trustee know where your important legal and financial documents are located.

My **safety deposit box** is located: (Financial Institution) \_\_\_\_\_

Address: \_\_\_\_\_

Box Number: \_\_\_\_\_ Key Location: \_\_\_\_\_

**Documents:** I have made duplicate copies of important documents.

Copies are stored in: \_\_\_\_\_

My original Will is stored: \_\_\_\_\_

My Executor has a copy of my Will:  Yes  No

My original **birth certificate** is stored: \_\_\_\_\_

My **social insurance certificate** is stored: \_\_\_\_\_

My company **retirement** and **other important papers** are stored: \_\_\_\_\_

My **military records** and **pension papers** are stored: \_\_\_\_\_

## ELECTRONIC PASSWORDS

Most of us now have electronic accounts. Whether for correspondence through email, or for commerce with banks and other merchants, or whether through social media like facebook, it will be your family's task to close these accounts in the future. You may list those key accounts here for their future reference.

**Email** \_\_\_\_\_  
Provider web address (e.g. www.gmail.com)                      Username                      Password

**Bank** \_\_\_\_\_  
Institution web address                      Username                      Password

**Bank** \_\_\_\_\_  
Institution web address                      Username                      Password

**Social** \_\_\_\_\_  
Institution web address                      Username                      Password

**Social** \_\_\_\_\_  
Institution web address                      Username                      Password

# Will Planner

## PERSONAL REPRESENTATIVES

Your choices of an Executor / Trustee and alternate Executor / Trustee are very important. Your Executor / Trustee should be a mature person capable of conducting business affairs. Your spouse, a relative or a friend could be possible choices. Because an Executor/Trustee could predecease you or be unable to serve, it's wise to choose an alternate. Trust companies also act as Executor / Trustee and will always be able to serve.

**Executor's Name / Relationship:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

**Co-Executor's Name / Relationship:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

**Alternate Co-Executor's Name / Relationship:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

**Power of Attorney Name / Relationship:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

**Guardian Name / Relationship:** \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Cell: \_\_\_\_\_ Email: \_\_\_\_\_

# Will Planner

## LEGAL & FINANCIAL REPRESENTATIVES

Several people or institutions may maintain records important in settling your estate. Many law firms have facilities for storing original Wills. Your Executor/Trustee will need access to your legal, financial and tax records. To ensure the smooth settlement of your estate, list the following information plus any other information you deem as relevant to your estate.

**Legal:** Firm: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

**Accountant:** Firm: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

**Insurance:** Company: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

**Banking:** Bank: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

**Investments:** Company: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

**Other:** Firm: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: Suite: \_\_\_\_\_ Street: \_\_\_\_\_

City / Town, Province & Postal Code: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_



# Will Planner

## FINANCIAL DETAILS

To ensure the smooth settlement of your estate, list the following information plus any other information you deem as relevant to your estate.

<b>Bank Information</b>
Financial Institution & Address:
Location of Statements or Bank Books:
Location of electronic passwords and usernames: See page 5

Assets (Cash, Savings Accounts)		
Bank / Trust Co.	Account Type	Account No.

Loans					
Bank / Trust	Loan #	Amount	Interest Rate	Payments	Maturity Date

Canada Savings Bonds / Treasury Bills				
Location of Bonds:				
Amount	Series	Maturity	Type (R, C)	Comments

# Will Planner

<b>Term Deposits / GICS</b>			
Financial Institution & Address:			
Location of Term Deposits:			
Bank / Trust	Amount	Interest Rate	Maturity Date

<b>Stocks and Other Equities</b> (or attach a photocopy of most recent statements)				
This section details all equity holdings-stock, options, warranty, rights, futures, and commodities.				
Financial Institution & Address:				
Location of Stocks:				
Quantity	Description	Original Cost	Purchase Date	Comments

<b>Bonds</b>				
Financial Institution & Address:				
Location of Bonds:				
Amount	Description	Cost	Purchase Date	Comments

# Will Planner

<b>Mutual Funds</b>				
Financial Institution & Address:				
Location of Statements:				
Fund Account #	Description	Quantity	Original Cost	Est. Current Value

<b>RRSP's or RRIF'S</b> (or attach account statement) This section details RRSP holdings and their locations.					
Financial Institution & Address:					
Location of RRSPs / RRIFs:					
Self	Spouse	Institution & Number	Type of Investment(s)	Est. Current Value	Beneficiary

<b>Life Insurance</b> – <input type="checkbox"/> <b>Personal Term</b> <input type="checkbox"/> <b>Personal Permanent "Whole"</b> <input type="checkbox"/> <b>Group</b>					
This section details insurance and their locations.					
Financial Institution & Address:					
Location of Policies:					
Self	Spouse	Institution & Number	Type of Investment (s) <i>If applicable</i>	Est. Current Value	Beneficiary

# Will Planner

**Pension Plans –**  Company  Deferred Profit Sharing  Group RRSP

Financial Institution & Address:

Location of Policies:

Self	Spouse	Institution & Number	Type of Investment(s) <i>If applicable</i>	Est. Current Value	Beneficiary

**Property – Residence, Condo, Cottage, Vehicles, Jewelry**

Item	Description	Purchase Price	Date Purchased	Comments

# Will Planner

## BALANCE SHEET

Making a summary of your assets and your current liabilities makes it easier to divide your estate, and helps your lawyer in the preparation of an actual Will.

Assets		Liabilities	
Personal Residence	\$	<b>Credit Cards</b>	
Cottage	\$		
Condominium	\$		
Time Share	\$		
Investment Property	\$		
Automobiles	\$		
<b>Investments</b>		<b>Loans</b>	
RRSP's	\$	Automobile Loan	\$
RRIF's	\$	Automobile Lease	\$
Mutual Funds	\$	Personal Loans	\$
Stocks	\$	RRSP Loans	\$
Bonds	\$	Other	
GIC's	\$		
Canada Savings Bonds	\$		
Bank Accounts	\$		
Trust Company Accounts	\$	Home Mortgage	
Life Insurance	\$	Cottage Mortgage	
Pension Benefits	\$	Investment Property Mortgage	
Jewelry	\$	Other Liabilities	
Art	\$		
Valuable Furnishings	\$		
Other Assets	\$		
Business Interests	\$		
<b>Total</b>	<b>\$</b>	<b>Total</b>	<b>\$</b>
<b>Net Worth (Assets minus Liabilities)</b>			

# Will Planner

## ESTATE DISTRIBUTION

Your Will does not need to describe precisely how you want every item in your estate distributed. However, if there is someone you wish to give a specific item or sum of money, or if there has been a change in your wishes outlined in previous Will, explain below.

In distributing your estate, consider dividing it in percentages, rather than in fixed amounts to take into account changes in the size of your estate. For possessions, consider listing specific items that are particularly valuable or have sentimental meaning to specific individuals, and then designate one individual to receive "the balance of my personal possessions."

Person or Charitable Organization	SPECIFIC Amount of Money or Description of Item to be distributed
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.

In your Will, you may divide the residue of your estate (what's left over after specific bequests listed above) among people and charitable organizations. Note your intentions, or changes below:

Person or Charitable Organization	RESIDUE of My Estate (Percentage)
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.
11.	11.
12.	12.

# Will Planner

**FROM THE WYCLIFFE COLLEGE CHAPLAIN,  
THE REV. ANNETTE BROWNLEE**

Why prepare for your funeral? Why not let your family and friends do it for you? Let me suggest a few reasons. At the time of death families are grief-stricken and often they are spread out. Families can be unsure of what the deceased wants or have different ideas about how to celebrate the life of a loved one. A church? Or a funeral home? Eucharist or not? Burial or cremation? What cemetery? What about sprinkling the ashes at the cottage?

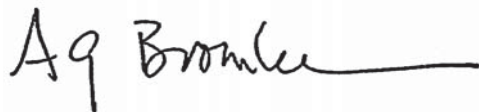
To lay out one's directives and desires is a gift to your family from the other side of life. It gives your family and friends comfort in the midst of their grief that they are honoring your wishes and commitments. It provides a way to reduce miscommunication and conflict at what is already a difficult time. It allows adult children and friends to participate in rituals which are important to you. It helps clergy too as they plan your funeral with family members or friends they might not know.

If you are a person of faith your burial service is a time to witness to the faith which has sustained you over the years. It is difficult to distract ourselves from the inevitability of death when a loved one has died. It is difficult to avoid the reality of our mortality when attend a funeral. Thus a funeral can be a time when people can hear and receive the news that through the resurrection of Jesus Christ, death not longer is a sword that can cut off love: your love for them and their love for you.

We offer the following questionnaire as a way to provide this gift to your family, friends, and clergy about how they would best honor your desires. It also consolidates important information in one place.

We recommend that you send one copy to your parish and keep one where your family can find it, here in this planner.

Yours in Christ,



The Rev, Annette Brownlee  
Wycliffe College Chaplain



# Will Planner

## PREPARING FOR MY DEATH, BURIAL AND THE CELEBRATION OF MY LIFE AT THE TIME OF DEATH

At the time of my death or near death please contact:

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone: \_\_\_\_\_

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_ Phone: \_\_\_\_\_

I have a preference for funeral homes:  No  Yes If yes, what funeral home? \_\_\_\_\_

Do you wish to be cremated:  No  Yes

Where do you wish your remains to be buried? \_\_\_\_\_

Do you have a directive about donating your body? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do you want memorial contributions to be sent to a specific institution(s): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## BURIAL SERVICE

My Church / Parish is: \_\_\_\_\_

Address: \_\_\_\_\_

Primary Contact: \_\_\_\_\_ Title: \_\_\_\_\_

I prefer the burial service in the Book of Common Prayer / Book of Alternative Services / Other: \_\_\_\_\_

\_\_\_\_\_

I wish the Eucharist to be celebrated at my funeral:  Yes  No

Clergy whom I would wish to be part in my funeral service:

Name: \_\_\_\_\_ Role: (e.g: presider, preacher) \_\_\_\_\_

Name: \_\_\_\_\_ Role: \_\_\_\_\_

Name: \_\_\_\_\_ Role: \_\_\_\_\_

Church musicians generally have the first right of refusal at any service that takes place in their parish.

Are there other musicians whom you'd like to have participate in / help organize funeral music:

Name: \_\_\_\_\_ Role: \_\_\_\_\_

Are their hymns or anthem you'd like to be a part of your service: \_\_\_\_\_

\_\_\_\_\_



# Will Planner

Family and friends whom I would wish to take part in my funeral service

Name: \_\_\_\_\_ Role: (e.g: reader / speaker) \_\_\_\_\_

Name: \_\_\_\_\_ Role: (e.g: reader / speaker) \_\_\_\_\_

Name: \_\_\_\_\_ Role: (e.g: reader / speaker) \_\_\_\_\_

Name: \_\_\_\_\_ Role: (e.g: reader / speaker) \_\_\_\_\_

Name: \_\_\_\_\_ Role: (e.g: reader / speaker) \_\_\_\_\_

In the Anglican Church, the burial services suggest Scripture readings appropriate for Christian burial. Other churches might not. Are their Scripture readings you would like to have a part of your service:

My favorite Old Testament reading is: \_\_\_\_\_

My favorite Psalm is: \_\_\_\_\_

My favorite New Testament reading is: \_\_\_\_\_

My favorite Gospel reading is: \_\_\_\_\_

What kind of gathering would you like to place before or after the service? \_\_\_\_\_

What else do you want your family, friends or clergy to know about your desires for the celebration of your life and your burial:

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Have you discussed the writing of your obituary? What instructions would you like to leave in this space below?

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Signature: \_\_\_\_\_ Date: \_\_\_\_\_





*In my Father's  
house are many  
mansions: if it  
were not so, I  
would have told  
you. I go to  
prepare a place  
for you.*

John 14:2



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