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WILL INSTRUCTION SHEET

PERSONAL INFORMATION

Full Legal Name	
Date of Birth	
Your Address	
Phone Number	
Band Membership Number	

Do you have a Spouse or Common-Law Partner?

YES

NO

What is the Full legal name of your Spouse or Partner?

Do you have Children?

YES

NO

CHILDREN

FULL LEGAL NAME	AGE

Do you have any deceased children?

YES

NO

If yes, please provide their full legal name?

Is there anyone who is financially dependent on you?

YES

NO

Please provide their full legal names and relationship to you:

FULL LEGAL NAME	RELATIONSHIP

If you have children under the age of 19, you will need to name a guardian. Please provide the full legal name of the guardian and their relationship to you:

Every Will needs an Executor. This person manages your estate after you have passed. I always recommend thinking of two people – one as the primary executor and the other as a backup. Please write down the full legal names of your executors:

1. _____

2. _____

ASSETS – It is important to understand and know what you own. Please fill in the chart below with any assets that you might have. In addition, please state the nature of ownership (sole or joint).

	DESCRIPTION	ESTIMATED VALUE	NATURE OF OWNERSHIP
REAL ESTATE – OFF-RESERVE OR CERTIFICATE OF POSSESSION			SOLE JOINT
BANK ACCOUNTS			SOLE JOINT
VEHICLES			SOLE JOINT
LIFE INSURANCE			BENEFICIARY: YES NO
RRSPS			BENEFICIARY: YES NO
BUSINESS			
OTHER			

ARTICLES are items of personal property that you might want to give away. You do not have to mention specific things in your will; however, if you have a particular item that you want to give to a particular person, it is a good idea to write it down

Do you have any specific items to give to specific people?

ITEM	FULL NAME OF PERSON YOU ARE GIVING IT TO

Who do you want your Estate to go to?

You can give your estate to one person or to as many people as you would like. For example, you could split your estate into thirds, quarters, equal shares or simply give it all to one person. Please write down who you would like your estate to go to? If you choose to give your estate to one person, I recommend choosing a back-up person as well.

1. _____
2. _____

3. _____

Last Wishes

You can also provide last wishes for funeral arrangements, such as burial or cremation. You can also specify any special service arrangements that you might like as well. If you would like us to include them in your will, please write them below:
