

What this is - and what it isn't

This worksheet helps you gather everything in one place before you meet a lawyer or notary to make your will and estate plan. Filling it in is a head start, not a substitute for legal documents. Prime Insurance does not prepare wills or provide legal advice. In BC, a valid will must meet the signing and witnessing rules of the Wills, Estates and Succession Act - a lawyer or notary can make sure it's done right.

1 About you

Full legal name

Date of birth

Home address

Phone

Email

Marital status

Spouse / partner full name

2 Children & dependents

List anyone who depends on you financially, including minor children, and their dates of birth.

Name

Date of birth

Name

Date of birth

Name

Date of birth

Attach extra pages if you need more space.

3 Executor

The person who will carry out your wishes. Name a first choice and a backup. Ask them first.

Executor - full name

Relationship

Phone

Email

City

Alternate executor - full name

Phone

4 Guardian for minor children

If you have children under 19, who would you want to raise them? Name a first choice and a backup.

Proposed guardian - full name

Relationship

Alternate guardian - full name

Phone

5 Your professional advisors

Lawyer / notary

Phone

Accountant

Phone

Financial / insurance advisor

Phone

Incapacity planning - your lawyer or notary will usually ask about these at the same appointment.

Power of Attorney in place? (Y / N) - held by

Representation Agreement? (Y / N)

6 Assets - what you own

Approximate values are fine. Note whether anything is jointly owned or already has a named beneficiary.

Real estate

Property address	Estimated value
_____	_____
Mortgage holder / balance owing	Joint owner (if any)
_____	_____

Bank & investment accounts

Institution	Account type	Approx. value
_____	_____	_____
Institution	Joint owner (if any)	Approx. value
_____	_____	_____

Registered accounts (RRSP / RRIF / TFSA / pension)

Plan & institution	Named beneficiary	Contingent
_____	_____	_____

Vehicles & other valuables

Description (vehicle, jewellery, collectibles, etc.)	Approx. value
_____	_____

Attach extra pages if you need more space.

7 Life insurance

Life insurance usually pays directly to the named beneficiary - outside the will. Confirm yours is current.

Insurer	Policy number	Coverage amount
_____	_____	_____
Beneficiary	Contingent beneficiary	
_____	_____	

8 Debts & liabilities

Mortgages, loans, lines of credit, credit cards, taxes owing.

Creditor	Type	Balance owing
_____	_____	_____
Creditor	Type	Balance owing
_____	_____	_____

Attach extra pages if you need more space.

9 Beneficiaries & specific gifts

These are notes, not instructions

Use this space to jot down who you might want to include and any specific gifts, as talking points for your lawyer or notary. These notes have no legal effect on their own - even if signed or dated - and are not a will.

Who might receive what? Specific gifts, heirlooms, charities, and how the rest might be divided.

10 Digital accounts & assets

Email, social media, cloud storage, crypto. Never write a password or master password in this document.

Password manager I use (e.g. 1Password, Bitwarden)

Crypto / other (note where, not how)

My master password is NOT written here. It is kept (e.g. in my safe, with my executor):

11 Where your documents are kept

Will

Insurance policies

Property deeds

Birth/marriage certs

Location(s) / safety deposit box / who has a copy (note separately if not all in one place)

12 Final wishes

These preferences are guidance for your family and advisors - not legally binding instructions. Discuss them too.

Burial

Cremation

No preference

Funeral / service wishes, organ donation, anything else

13 Notes & questions for your lawyer or notary
