HUMMINGBIRD
NOTARIES

VANCOUVER
323 Jervis St #60,
Vancouver, BC V6C 3P8
(Coal Harbour Seawall)

WILL QUESTIONNAIRE

Last Will and Testament | Confidential client instructions

This form helps us prepare your Will. Please answer what you can. If you are not sure about something, write **"not sure"** and we will go through it together at your appointment.

IMPORTANT: PLEASE BRING YOUR OWN WITNESS TO YOUR SIGNING. By law, your Will must be signed in front of two witnesses. Tanvi Ahuja is one. You must bring the second: an adult who receives nothing under your Will (see page 2). **They must be present for the whole signing, or we cannot sign your Will.** Please also bring your original photo ID, and ask your witness to bring two pieces of original ID.

How it works

1. **Fill in this form**
   Type into it on your computer, or print it and write by hand.
2. **Send it to us**
   Upload the form and the items below to the secure link we email you after you book.
3. **We prepare your Will**
   We review it with you and book your signing. Bring your witness.

Please send us

- ☐ **Your ID**
  Two pieces of government ID: one with your photo, and one showing your current address.
- ☐ **ID for your Executors and any Guardian**
  Showing their full legal name and address.
- ☐ **ID for your beneficiaries, if you have it**
  If not, simply fill in their details in Part 9.
- ☐ **ID for your second witness**
  Showing their full legal name and address. See page 2.
- ☐ **Copies of your existing Will and estate planning documents**
  Your current Will, Power of Attorney or Representation Agreement, and any marriage, separation or business agreements.

Why we ask for ID: your Will must use each person's full legal name exactly as on their ID. Please ask each person first.

BEFORE YOU START | YOUR SECOND WITNESS

Please arrange your second witness before anything else. Without them, we cannot sign your Will at your appointment.

Your second witness

By law (the *Wills, Estates and Succession Act*), your Will must be signed in front of two witnesses who are present at the same time. Tanvi Ahuja will be one witness. **We do not provide a second witness, so please bring one adult with you to your signing appointment.** We record your witness's details in case they are ever needed to confirm how your Will was signed.

Who can be your witness? Your witness must be 19 or older and able to understand what they are witnessing. They should not be a beneficiary under your Will, the spouse or partner of a beneficiary, your own spouse or partner, or a person you are naming as Executor or Guardian. A gift in a Will to a witness, or to a witness's spouse, may be void. A friend, neighbour or colleague who receives nothing under your Will is usually a good choice. For Mirror Wills, you and your partner cannot witness each other's Wills, but the same independent witness may sign both.

Witness: first name | Middle name(s) | Last name | Date of birth (YYYY/MM/DD)

Witness: address (street, city, province, postal code) | Occupation

Witness: phone | Witness: email | How does the witness know you?

Is the witness a beneficiary, the spouse or partner of a beneficiary, your spouse or partner, or someone you are naming in your Will? ☐ No ☐ Yes

Details:

Your witness must bring two pieces of original identification to the appointment, at least one of which is government-issued with a photo (such as a driver's licence, passport or BC Services Card). The name on the identification must match the name above. If your witness does not arrive with valid identification, we will need to reschedule the signing.

PART 1 | ABOUT YOU

Will-maker

Full legal name (exactly as on your ID)

Other names you use or have used

Date of birth

Place of birth (city, country) **(required)**

Occupation (or former occupation)

Home address (street, city, province, postal code)

Mailing address, if different

Cell phone

Other phone

Email

Citizenship: ☐ Canadian ☐ Permanent resident ☐ U.S. ☐ Other

Details:

Are you, or is a parent or grandparent of yours, a U.S. citizen or green card holder? ☐ No ☐ Yes

Details:

Spouse or partner (complete if making Mirror Wills)

Mirror Wills are matching Wills for spouses or partners, made together. Please complete one questionnaire for both of you. We meet with you together, and anything either of you tells us will be shared with both of you. If either of you would like to give instructions privately, or you want different Wills, please tell us and we will meet with you separately.

Full legal name (exactly as on ID)

Other names used

Date of birth

Place of birth (city, country) **(required)**

Occupation (or former occupation)

Cell phone

Email

Address, if different from above

Citizenship: ☐ Canadian ☐ Permanent resident ☐ U.S. ☐ Other

Details:

PART 2 | YOUR SITUATION

When do you need your Will completed by?

Preferred appointment location: ☐ The Perch (Coal Harbour) ☐ Mobile visit

Why are you making or updating your Will now? (for example: new home, marriage, children, travel, health, retirement)

Do you have an existing Will? ☐ No ☐ Yes

Details:

If yes, please send us a copy, plus any other existing estate planning documents, and tell us when and where it was made.

Do you have a Will, or assets, in another province or country? ☐ No ☐ Yes

Details:

Existing documents: ☐ Power of Attorney ☐ Representation Agreement ☐ Advance Directive ☐ None

Is there anything we should know to plan your appointment? (for example: hearing, vision or mobility needs, a language interpreter, or a home or hospital visit)

PART 3 | RELATIONSHIP HISTORY

Under BC law, a spouse includes a person you are married to, and a person you have lived with in a marriage-like relationship for at least two years. Spousal status can end on separation, so please answer these questions carefully.

Current status: ☐ Single ☐ Engaged ☐ Married ☐ Common-law / marriage-like ☐ Separated ☐ Divorced ☐ Widowed

Spouse's or partner's full name (if not listed in Part 1)

Date of marriage, or date you began living together

Have you ever separated (for any length of time), or are you living apart now? ☐ No ☐ Yes

Details:

Are you living with someone other than the spouse named above? ☐ No ☐ Yes

Details:

Have you been married or in a marriage-like relationship before? ☐ No ☐ Yes

Details:

Do you have a marriage, cohabitation or separation agreement? (please send a copy) ☐ No ☐ Yes

Details:

Do you pay or receive child or spousal support, or are any family law proceedings underway? ☐ No ☐ Yes

Details:

PART 4 | CHILDREN AND FAMILY

List all of your children and your spouse's or partner's children, including adopted children, stepchildren, children from a previous relationship, and any child who has passed away. In BC, your spouse and children may apply to court to vary a Will that does not make adequate provision for them, so it is important that we have a complete picture.

Full legal name	Date of birth	Child of (you / partner / both)	Biological, adopted, step	Lives outside Canada? Has children?

Does any child or beneficiary have a disability, receive disability benefits, or need help managing money? ☐ No ☐ Yes

Details:

Do you intend to leave unequal shares to your children, or leave any child or your spouse out of your Will? ☐ No ☐ Yes

Details:

Have any of your children passed away leaving children of their own? ☐ No ☐ Yes

Details:

Have you made gifts or loans to any child that should be taken into account, or forgiven, on your death? ☐ No ☐ Yes

Details:

Is anyone else financially dependent on you (for example, a parent)? ☐ No ☐ Yes

Details:

Are you a guardian, committee, executor or attorney for anyone else? ☐ No ☐ Yes

Details:

Do you, your spouse or your children have stored eggs, sperm or embryos, or plans to use assisted reproduction? ☐ No ☐ Yes

Details:

Your family tree

Please use this space to draw or list your family: your parents, your spouse or partner (and any former spouses), your children and grandchildren, and your brothers and sisters. Note anyone who has passed away. This helps us identify everyone who may inherit under your Will or under BC law. You may also attach a separate page.

Your brothers and sisters

Most important if you have no spouse or children, as your siblings and their children may inherit if a gift in your Will fails.

Full name	Full or half sibling	Year of death (if passed away)	Their children (your nieces and nephews)

Anyone else we should know about (former spouses, children of a former relationship, people you have helped raise, other dependants):

PART 5 | YOUR ASSETS AND DEBTS

Approximate values are fine. Assets held jointly with someone, and assets with a named beneficiary (such as RRSPs, RRIFs, TFSAs, pensions and life insurance), usually pass outside your Will. If an asset is held jointly with anyone other than your spouse, please tell us whether you intend the other owner to keep it on your death, or whether it was put in joint names for convenience only and should form part of your estate.

Real estate

Property address	Type (home, rental, cabin, leasehold, co-op, timeshare)	Owners and how held (sole, joint, tenants in common)	Approx. value	Mortgage owing

Is any mortgage life-insured? ☐ No ☐ Yes

Details:

Bank accounts and non-registered investments

Institution	Type (chequing, GIC, investments)	Sole or joint (with whom)	If joint: survivor keeps, or part of estate?	Approx. value

Registered plans, pensions and life insurance

Type (RRSP, RRIF, TFSA, pension, RESP, RDSP, insurance)	Institution	Named beneficiary or successor holder	Approx. value

Do you own a business, corporation shares, a partnership interest or a professional practice? ☐ No ☐ Yes

Details:

If yes, please send a copy of any shareholders', partnership or buy-sell agreement.

Do you own assets outside BC or outside Canada? ☐ No ☐ Yes

Details:

Are you entitled to an inheritance or an interest in an estate or trust, or holding assets in trust for anyone? ☐ No ☐ Yes

Details:

Vehicles, boats, jewellery, art, collections and other valuable items:

Digital assets (cryptocurrency, online accounts, websites, photos, reward points such as Aeroplan) and whether anyone knows how to access them:

Debts (mortgages, lines of credit, loans, guarantees) and any money owed to you:

Estimated total net worth (assets less debts)

PART 6 | EXECUTOR

Your Executor administers your estate: they arrange the funeral, collect your assets, pay your debts and taxes, and distribute your estate. Please speak with the people you wish to appoint before naming them.

Who can be your Executor? Under BC law, each person you name must:
- be 19 or older when they act (a person under 19 cannot apply for a grant of probate);
- be mentally capable of managing your estate, and willing to act; and
- be an individual, or a trust company authorized to act as executor.

An Executor may live outside BC, but this can make the administration of your estate slower and more costly, and may have tax consequences. Your Executor may also be a beneficiary, but should not be a witness to your Will.

Where possible, choose someone who lives near you. It is much easier for your Executor to deal with your home, belongings, bank and other matters in person if they live close by. We understand this is not always possible; if not, choose the person you trust who lives closest to you.

Executor

Full legal name (as shown on ID)

Relationship to you

Address (street, city, province, postal code)

Phone

Email

We highly recommend naming an alternate Executor. If your Executor passes away before you, or is unable or unwilling to act, an alternate can step in without delay. Without an alternate, someone would need to apply to court to be appointed administrator of your estate, which adds cost and delay, or you would need to make a new Will.

First Alternate Executor (highly recommended)

Full legal name (as shown on ID)

Relationship to you

Address (street, city, province, postal code)

Phone

Email

Second Alternate Executor (optional)

Full legal name (as shown on ID)

Relationship to you

Address (street, city, province, postal code)

Phone

Email

If two or more Executors act together, decisions by: ☐ Majority ☐ All must agree ☐ Not applicable

Executor compensation: ☐ As allowed by law ☐ No fee (expenses only) ☐ Discuss

Is any person named above a U.S. citizen or resident, or living outside Canada? ☐ No ☐ Yes

Details:

PART 7 | GUARDIAN FOR CHILDREN UNDER 19

Complete if you have children under 19. A guardian cares for your children if both parents have passed away. A guardian must be 19 or older and willing to act. Please speak with the people you wish to appoint first.

Guardian

Full legal name (as shown on ID)

Relationship to you

Address (street, city, province, postal code)

Phone

Email

Alternate Guardian

Full legal name (as shown on ID)

Relationship to you

Address (street, city, province, postal code)

Phone

Email

PART 8 | SPECIFIC GIFTS

List any particular items, cash amounts, property or charitable gifts you wish to leave to particular people. For charities, please give the full name and city, and confirm it is a registered charity. Smaller personal items can be dealt with in a separate memorandum.

Gift (item, cash amount, property)	To whom (full name)	Relationship	If they pass before you, gift goes to

If you leave real estate with a mortgage, should the mortgage be paid by: ☐ My estate ☐ The person receiving it ☐ Not applicable

Packing, shipping and insurance costs for gifted items paid by: ☐ My estate ☐ The recipient ☐ Not applicable

PART 9 | THE REST OF YOUR ESTATE (RESIDUE)

The residue is everything left after debts, taxes, expenses and specific gifts are paid.

Leave the residue outright to my spouse or partner, if they survive me by 30 days? ☐ Yes ☐ No ☐ Not applicable

If my spouse passes first, or I have none, to my children in equal shares? ☐ Yes ☐ No ☐ Not applicable

If a child passes before me, their share goes to: ☐ Their children ☐ My other children ☐ Other

Details:

Age at which young beneficiaries receive their share: ☐ 19 ☐ 21 ☐ 25

Does any beneficiary have a disability or receive disability benefits that an inheritance could affect? ☐ No ☐ Yes

Details:

Please note. As notaries, we prepare Wills under the *Notaries Act* and the *Wills, Estates and Succession Act*. We can hold a young beneficiary's share in trust until age 25 at the latest. If you would like a trust that continues beyond age 25, a trust for a beneficiary with a disability (such as a Henson trust), a life interest or spousal trust, or a mutual Wills agreement, we will refer you to an estate lawyer.

If your residue should be divided differently, or among other people or charities, list them below:

Beneficiary (full name or charity)	Relationship	Share (%)	If they pass before you, share goes to

Beneficiary details

Please list every person or charity named in Parts 8 and 9, unless you have already sent us a copy of their identification. Use their full legal name exactly as it appears on their identification. For a charity, give its full name, city and charitable registration number, if known.

Full legal name (or charity name)	Relationship to you	Current address (street, city, province or country)	Date of birth (if under 25)

If none of the people above survive you, who should receive your estate?

If you are leaving out, or leaving less to, your spouse or any child, please explain your reasons. We will discuss how to record them, as they may help your Executor if the Will is challenged.

PART 10 | OTHER WISHES

Funeral wishes: ☐ Burial ☐ Cremation ☐ No preference / Executor decides

Details:

Have you made pre-paid funeral arrangements? ☐ No ☐ Yes

Details:

Do you have pets you want to leave to a caregiver (with or without a gift of money)? ☐ No ☐ Yes

Details:

Mirror Wills: may the surviving spouse change their Will freely after the first death? ☐ Yes ☐ Discuss

If someone holds your Power of Attorney, may we give them a copy of your Will on request? ☐ No ☐ Yes

Where will you keep your original Will? ☐ At home (fireproof box) ☐ Safety deposit box ☐ Other

Details:

Wills Notice (BC Vital Statistics Wills Registry)

We file a Wills Notice for every Will we prepare. It records where your original Will is kept, so your Executor can find it. It does not file the Will itself. Please confirm the details below exactly as they appear on your birth certificate or ID. The date of your Will is added at signing.

First name | Middle name(s) | Last name

Other names (including birth or former surname) | Date of birth (YYYY/MM/DD)

Place of birth: city **(required)** | Province or state | Country

Where the original Will will be kept (name of place) | Address of that place

Mirror Wills, partner: first, middle and last name | Partner's place of birth: city, province or state, country **(required)**

PART 11 | NOTES, SIGNING AND IDENTIFICATION

Any other wishes or questions:

Your second witness: please complete the witness details on page 2.

Please do not write on any copy of your Will. In BC, notes on a Will or a copy of it can sometimes be treated as your wishes. If anything needs to change, please tell us and we will make the change for you.

Reminder: please send the identification and documents listed on page 1 before your appointment, and bring your original photo identification to your signing.

Confirmation

Your Will must reflect your own wishes. A family member may help you complete this form, but we will review your instructions with you before your Will is prepared and signed. This form assumes that only BC and Canadian law apply to you and your assets. All information is kept confidential.

I confirm that the information in this questionnaire is true and complete to the best of my knowledge, and reflects my own wishes. I understand that Tanvi Ahuja Notary Corporation will rely on this information to prepare my Will.

Will-maker name

Date

Spouse / partner name (Mirror Wills)

Date

Name of anyone who helped you complete this form