

## Questions to Ask When Drafting Your Will: A Practical Guide for Effective Estate Planning

### Part I: What Are My Directives/Desires Regarding My Funeral?

#### Choices | Partner 1

Last Name :

First Name:

#### 01. What Are My Directives/Desires Regarding My Funeral?

|                                                                             |               |            |
|-----------------------------------------------------------------------------|---------------|------------|
| What burial method do I prefer?                                             | Burial        | Cremation  |
| Should I leave the choice to:                                               | My loved ones | Liquidator |
| Do I want my body to be displayed?                                          | Yes           | No         |
| Do I prefer a religious service or no ceremony?                             | Yes           | No         |
| Would I like my ashes to be placed in a biodegradable urn to become a tree? | Yes           | No         |
| Would I like my ashes to be scattered at sea?                               | Yes           | No         |
| Have I already made arrangements with a funeral home?                       | Yes           | No         |
| Have I already reserved a plot in a cemetery?                               | Yes           | No         |
| Do I want to leave a letter before my funeral?                              | Yes           | No         |

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|                                                                             |               |            |
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| Do I want to leave a letter before my funeral?                              | Yes           | No         |

### Part 2: Organ Donations

In a will or protection mandate, it is possible to indicate your choice to accept or refuse organ donation. This decision will then be recorded in the electronic organ donation registry of the Chamber of Notaries, making the information more easily accessible to doctors. It is also possible not to make a decision.

|            |                              |                             |
|------------|------------------------------|-----------------------------|
| Partner 1: | Yes, I accept organ donation |                             |
|            | With donation to science     | Without donation to science |
|            | No, I refuse organ donation  |                             |
|            | I choose not to decide       |                             |

|            |                              |                             |
|------------|------------------------------|-----------------------------|
| Partner 2: | Yes, I accept organ donation |                             |
|            | With donation to science     | Without donation to science |
|            | No, I refuse organ donation  |                             |
|            | I choose not to decide       |                             |

| Do I have any health issues? | Partner 1: |    | Partner 2: |    |
|------------------------------|------------|----|------------|----|
|                              | Yes        | No | Yes        | No |
| Details:                     |            |    |            |    |

### Part 3: Settling My Estate - The Liquidator

#### Choosing the liquidator(s)

Whom Do I Wish to Entrust with the Responsibility of Settling My Estate? This involves carrying out the necessary tasks for managing the estate, such as closing bank accounts, settling debts, selecting an accountant, and distributing shares to the heirs.

It is possible to appoint one or more liquidators. It is advisable to appoint liquidators who already have a trusting relationship with each other.

| Liquidator Choices                                                                           | Partner 1:          | Partner 2:          |
|----------------------------------------------------------------------------------------------|---------------------|---------------------|
| Liquidator   1 <sup>st</sup> Choice:                                                         | Name :<br>Address : | Name :<br>Address : |
| Liquidator   2 <sup>nd</sup> Choice:                                                         | Name :<br>Address : | Name :<br>Address : |
| Should the liquidators act together, or is the second liquidator appointed as a replacement? |                     |                     |

## Powers of the Liquidator(s)

The powers of the liquidator will be explained by the notary during the will interview.

However, you can already decide whether you wish to compensate the liquidator or only reimburse their expenses related to their duties (expenses that will be reimbursed from the estate assets).

| Would you like the liquidator to be entitled to reimbursement for:   | Partner 1: |    | Partner 2: |    |
|----------------------------------------------------------------------|------------|----|------------|----|
| Their expenses:                                                      | Yes        | No | Yes        | No |
| Their expenses, travel costs, and lost wages:                        | Yes        | No | Yes        | No |
| Would you like the liquidator to have the right to reimbursement of: | Yes        | No | Yes        | No |
| Based on an amount of:                                               |            |    |            |    |
| At what frequency:                                                   |            |    |            |    |
| Amount to be indexed:                                                |            |    |            |    |

## Part 4: The Bequest of My Assets

What Are My Wishes Regarding the Distribution of My Assets?

Who do I wish to leave the rest of my assets to? These questions will be discussed in detail with the notary.

Do I wish to bequeath a specific asset or a sum of money to one or more people?

| My Assets                       | Partner 1: |    | Partner 2: |     |
|---------------------------------|------------|----|------------|-----|
| Am I the owner of a property?   | Yes        | No | Yes        | No  |
| Am I the owner of a business?   | Yes        | No | Oui        | Non |
| Have I already created a trust? | Yes        | No | Yes        | No  |

| Specific Bequests                                                  | Partner 1:                  | Partner 2:                  |
|--------------------------------------------------------------------|-----------------------------|-----------------------------|
| Specific Bequests:                                                 | To whom:<br>Which asset:    | To whom:<br>Which asset:    |
| Options for Multiple Specific Bequests:                            | Yes                      No | Yes                      No |
| Bequest of my RRSP/TFSA/RESP in full to my partner:                | Yes                      No | Yes                      No |
| Bequest of my RRSP only to my partner:                             | Yes                      No | Yes                      No |
| Bequest of my TFSA only to my partner:                             | Yes                      No | Yes                      No |
| Bequest of my RESP only to my partner:                             | Yes                      No | Yes                      No |
| Bequest of the right to use the principal residence to my partner: | Yes                      No | Yes                      No |

| Legs universels                                                  | Partner 1:                  | Partner 2:                  |
|------------------------------------------------------------------|-----------------------------|-----------------------------|
| To whom?                                                         | To whom:<br>Which asset:    | To whom:<br>Which asset:    |
| In what proportion?                                              |                             |                             |
| In case of death or refusal of this person:                      |                             |                             |
| Goes to their own descendants?                                   | Yes                      No | Yes                      No |
| Or goes to their co-heirs?                                       | Yes                      No | Yes                      No |
| Or goes to their own descendants, and if not, to their co-heirs? | Yes                      No | Yes                      No |
| Or goes to another person, namely:                               |                             |                             |

## Part 5: And If I Leave Minor Children?

In the event of the death of both parents, different scenarios must be anticipated, and several trusted individuals should be chosen. The parents must indicate the same people.

It is important to inform the chosen individuals to ensure they will accept this responsibility.

| Who Will Be in Charge of the Guardianship of My Children? | Partner 1: | Partner 2: |
|-----------------------------------------------------------|------------|------------|
| Name                                                      |            |            |
| Address                                                   |            |            |
| Replacement in case of death/refusal:                     |            |            |

| Who Will Be Responsible for Managing the Assets Bequeathed to My Minor Children?<br>(This could be the guardians or other individuals) | Partner 1: | Partner 2: |
|----------------------------------------------------------------------------------------------------------------------------------------|------------|------------|
| Name                                                                                                                                   |            |            |
| Address                                                                                                                                |            |            |
| Replacement in case of death/refusal:                                                                                                  |            |            |

| At What Age Do I Wish My Minor Children to Receive Their Inheritance? | Client Response                                                                     |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Total at:                                                             | Years                                                                               |
| In installments:                                                      | % at 18 years or at Years<br>% at 21 years or at Years<br>% at 25 years or at Years |