

Practical Perspectives on Estate Planning

Please complete each of the questions below. A 'To Do' could point to an estate planning opportunity undertaken as part of a fully integrated and customized strategy.

	Yes	No	To Do	
1. Do you have a formal financial plan that looks at all aspects of your life to develop a tailored strategy that reflects your current situation as well as your future goals?	()	()	()	<i>Yes</i> <input type="radio"/>
2. Have you considered how you want your personal effects distributed such as jewellery, cars, boats, household goods and furniture?	()	()	()	<input type="radio"/>
3. Would you like to leave cash bequests to specific family members or friends?	()	()	()	<i>No</i> <input type="radio"/>
4. Would you like to leave cash bequests to any preferred charities?	()	()	()	<input type="radio"/>
5. Have you identified if there is a need for a trust in your estate plan?	()	()	()	
6. Have you chosen an executor to administer your estate?	()	()	()	<i>To Do</i> <input type="radio"/>
7. Do you have a list of all your beneficiaries (spouse, children, grandchildren, other family members, friends and charities etc.)?	()	()	()	<input checked="" type="radio"/>
8. Do you have a list of all your assets (banking and investment accounts, personal effects, etc.)?	()	()	()	

continued overleaf

	Yes	No	To Do
9. If you own your own business, do you have a business succession plan in effect?	()	()	()
10. Do you have a formal partnership/shareholder agreement?	()	()	()
11. Do you have any special instructions for your funeral?	()	()	()
12. Have you pre-arranged it?	()	()	()
13. Has payment been made for these arrangements?	()	()	()
14. Have you named a guardian for your children?	()	()	()
15. Do you have any legal obligations that may affect the distribution of your assets through your Will (i.e. marriage separation agreements, other dependants, debts, and business buy/sell agreements)?	()	()	()
16. Do you currently have powers of attorney?	()	()	()
17. Do you have a current Will?	()	()	()
18. Have you stored your Will in a safe place (such as a safety deposit box) and advised your next of kin of its location?	()	()	()

With offices across Canada, the Scotiatrust experts at Scotia Private Client Group have helped generations of Canadians in the creation and administration of customized estate plans.

The information in this checklist is not intended to replace the advice of a lawyer or accountant and should not be relied upon as such.