Estate planning health-check questionnaire

A comprehensive estate plan – including an up-to-date Will and Powers of Attorney[1], appointing Executors and Attorneys suitable for the role – can help ensure your estate and loved ones are protected now and in the future. By conducting this "health-check" questionnaire we can help identify the steps you should take and whether updates are required to help avoid potential problems now and down the road.

WILL A legal document to deal with matters after your death	Yes	No	I don't know
1. Do you have a Will?	☐	☐	☐
2. If you do have a Will, is it up-to-date?	☐	☐	☐
a. Have you experienced a material change in your personal or asset situation? For example, has your marital status changed or have you bought or sold a property?	☐	☐	☐
b. Does the distribution in your Will still reflect your current wishes and intentions?	☐	☐	☐
c. Do the Executors you've named remain appropriate candidates for the role?	☐	☐	☐
3. Do you have at least one alternate Executor listed in your Will, after the primary Executor and/or have you appointed a trust company to the role?	☐	☐	☐
4. Are all of your Executors residents of Canada?	☐	☐	☐
5. Does your Advisor know who your Executors are and how to reach them?	☐	☐	☐
POWERS OF ATTORNEY A legal document that gives someone else the authority to act on your behalf during your lifetime			
1. Do you have Powers of Attorney for property/financial matters and your personal care?	☐	☐	☐
2. Are your Powers of Attorney up-to-date?	☐	☐	☐
a. Do the Attorneys you've named remain appropriate candidates for the role?	☐	☐	☐
3. Do you have at least one alternate Attorney appointed, after the primary Attorney and/or have you appointed a trust company as your Attorney for property?	☐	☐	☐
4. Are all of your Attorneys residents of Canada?	☐	☐	☐
5. Does your Advisor know who your Attorneys are and how to reach them?	☐	☐	☐
BENEFICARY DESIGNATIONS A person or charitable organization that is entitled to receive the asset at the time of your death			
1. Have you signed designation of beneficiary forms for the following:	☐	☐	☐
a. Registered Accounts (RSPs, RIFs, TFSAs)	☐	☐	☐
b. Insurance Policies	☐	☐	☐
2. Are all designations compatible with the terms of your Will?	☐	☐	☐

If you have answered "No" or "I don't know" to any of the questions above, a consultation with your Advisor is strongly recommended to ensure your estate planning needs are in order. Together with your Advisor, our RBC Estate and Trust experts can work with you to create a customized estate plan.

1 Depending on the province/territory, the term used to describe a "Power of Attorney" during the donor's incapacity may vary. Some provinces/territories may refer to it as a "continuing" or "enduring" Power of Attorney. In Quebec, it is referred to as a "Mandate in case of incapacity." In British Columbia a Representation Agreement covers health and personal care decisions and can also cover routine financial and legal affairs. Please check with your jurisdiction's legislation for the appropriate term.

119049 (01/2018)