

# 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?	( )	( )	( )
2. Have you considered how you want your personal effects distributed such as jewellery, cars, boats, household goods and furniture?	( )	( )	( )
3. Would you like to leave cash bequests to specific family members or friends?	( )	( )	( )
4. Would you like to leave cash bequests to any preferred charities?	( )	( )	( )
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?	( )	( )	( )
7. Do you have a list of all your beneficiaries (spouse, children, grandchildren, other family members, friends and charities etc.)?	( )	( )	( )
8. Do you have a list of all your assets (banking and investment accounts, personal effects, etc.)?	( )	( )	( )

*continued overleaf*

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	<b>Yes</b>	<b>No</b>	<b>To Do</b>
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 Scotiabank 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.