willful.

What to expect when making your estate plan.

Making your will and power of attorney documents is simpler than most people expect. We'll walk you through everything you need: about you, your family, your estate, and your final arrangements. Here's a look at the kinds of questions you'll see along the way, so nothing comes as a surprise.

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About you

We collect a few personal details to make sure your estate plan meets the legal requirements of your province.

- [ ] **Full legal name**
  Your name exactly as it appears on government ID.
- [ ] **Date of birth**
  Day, month, and year you were born.
- [ ] **Where you live**
  Your city and province.
- [ ] **Phone number**
  A number we can reach you at if needed.



Your family

We learn about your family so we can plan for the people (and pets) who depend on you.

- [ ] **Your marital status**
  Single, married, common-law, separated, or divorced.
- [ ] **Spouse's full legal name**
  Your partner's name as it appears on government ID.
- [ ] **Children**
  Names and birthdates of any children.
- [ ] **Guardians for minor children**
  Who would care for them if anything happened to you.
- [ ] **Pets and their guardians**
  Names of your pets and who would look after them.
- [ ] **Pet trust**
  An amount to cover their food, vet, and care.



Your estate

We map out who receives what, so your belongings and savings go where you want them to.

- [ ] **Specific gifts (heirlooms, jewellery, keepsakes)**
  Items you want to leave to a particular person.
- [ ] **Legacy gifts to charity (donations)**
  A specific dollar amount donated to a charity.
- [ ] **Primary beneficiary**
  The person or people who inherit your estate.
- [ ] **How you'd like to divide your estate**
  The share each beneficiary will receive.
- [ ] **Contingent beneficiary**
  The ultimate backup beneficiary if your primary can't inherit.
- [ ] **Inheritance age for minors**
  An age when minors gain access to their share.



Your arrangements

We capture your wishes for end-of-life care, and the people you trust to carry them out faithfully.

- [ ] **Your executor and backup executors**
  Trusted people who will carry out your will.
- [ ] **Your final resting place**
  Burial, cremation, or another preference.
- [ ] **Your ceremony wishes**
  The kind of service or memorial you'd like.
- [ ] **Your attorneys for health and property decisions**
  People who can act on your behalf if you're unable to.
- [ ] **Preferences for pain management and life-extending measures**
  Your wishes for pain management and life support.

Don't forget to execute your documents. Print your will and power of attorney documents, then sign each in front of two witnesses to make them legally valid.

HELPFUL RESOURCES Scan or click the QR codes

Learn Centre
Estate planning explained in simple, accessible articles.
willful.co/learn

Support Centre
Account and product help in clear, easy-to-follow guides.
support.willful.co