

**ONTARIO ESTATE
CONSULTING SOLUTIONS INC.**

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Estate Readiness Survey

Your Name _____

Survey Date _____

What is your current will status?

- I have one will per person
- I have two or more wills per person - recommended
- I have no will

Ontario's estate reform happened in January 2015. If you have a will, how old is it?

- Older than January 2015
- Newer than January 2015

If you have a will, who prepared it?

- I did it myself with a will kit or online or by hand
- A lawyer prepared it (write lawyer's name below)

If you have a will, when was it last reviewed?

- Since January 2015 Ontario estate reform
- Within the last 5 years
- Within the last 10 years
- Over 10 years ago

Select the marital status that most clearly resembles your current situation:


- Never married
- 1st marriage
- 2nd (or subsequent marriage)
- Separated
- Divorced
- Common Law
- Same Sex
- Widowed

Select the occupational category that best describes your current situation:

- Employee
- Homemaker
- Self Employed
- Retired
- Owner operator of an unincorporated business
- Shareholder of a private corporation

Select the response that best describes how the majority of your assets are registered:

- Joint with my spouse / partner
- In my name alone
- Joint with someone else - not a spouse / partner

	<input type="checkbox"/> A mixture of ownership types
Describe your children:	<input type="checkbox"/> None <input type="checkbox"/> All are adults <input type="checkbox"/> I have no children of my own but there are children residing in my home <input type="checkbox"/> I have some children who are under age 18 <input type="checkbox"/> I have children with special needs
Describe the people who are financially dependent on you:	<input type="checkbox"/> No one <input type="checkbox"/> Spouse or partner <input type="checkbox"/> Children under the age of majority <input type="checkbox"/> Spouse or partner and children <input type="checkbox"/> Adult children <input type="checkbox"/> Other
In the event of your death, what is the likelihood that there would be conflict among your executors, beneficiaries or other family members?	<input type="checkbox"/> Not at all likely <input type="checkbox"/> Somewhat likely <input type="checkbox"/> Very likely <input type="checkbox"/> Almost inevitable
I have considered my options to reduce or eliminate Ontario Estate Administration Tax in my estate?	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have a valid Power of Attorney for Property in place?	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have a valid Power of Attorney for Personal Care in place?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Who are your current executors?	<input type="checkbox"/> Don't know or don't have <input type="checkbox"/> Trust Company has been appointed Primary executor _____ In Second Position _____ In Third Position _____
Would you be interested in a one hour complimentary consultation to discuss your estate situation? 	<input type="checkbox"/> No <input type="checkbox"/> Yes =====> if yes then please contact: <p style="text-align: center;">Jim Kibble BBA,CPA,CA,TEP,CEA Ontario Estate Consulting Solutions Inc. Kitchener Branch 226-600-2984 jim@kibblefamily.com</p>

