

This checklist covers important questions to be considered when you draw up a will with a notary. It has been developed from information provided by PME INTER Notaires.

Our team would be pleased to help you with this matter.

T 514 788-6485 | **Toll-free** 1 800 291-0337

Monday to Thursday from 8 a.m. to 8 p.m. | Friday from 8 am. to 5 p.m.

- Do you want to make an organ or tissue donation?
YES or NO
- Do you want to donate your body to science?
YES or NO

Instructions concerning funeral

- Do you want a wake or a visitation with or without a viewing? If so, for how many days or evenings?
- Do you want to be buried or cremated?
- Do you want a funeral (religious place, crematorium, funeral home or graveside)? Or do you want a memorial service (community centre, outdoors or family home)?
- If you want to be cremated, what do you want your liquidator to do with your ashes?
- Do you have a family plot, niche or crypt? If so, provide the necessary information at the appointment.
- Have you prearranged your funeral? If so, provide the necessary information at the appointment.

Insurance policy

- Do you have an insurance policy? Do you have a designated beneficiary? Does this arrangement still reflect your wishes?

Specific bequests

- If you want to make specific bequests, specify the property and who will receive it.
- If such person cannot receive the bequest, will the property go to another person or will it go back into the estate?

Residuary bequests

(for the remainder of your property)

- To whom do you generally want to bequeath your property? If to more than one person, specify the percentage that each will receive.
 - Specify who will receive the property if such persons predecease you.

Example 1

- I bequeath my property to my wife X and, failing her, to my children, Y and Z, in equal shares.
- If one of my children predeceases me, their share will go to the surviving child.
- If neither of my children survives me, I bequeath my property to my sister A.

Example 2

- I bequeath 30% to my brother X, 30% to my brother Y and 40% to my sister Z.
- If my brother Z predeceases me, I want his share to go to his children.
- If my brother Y predeceases me, I want his share to go to my sister Z.
- If my sister Z predeceases me, I want her share to be divided equally between my brothers.

Designation of the liquidator

- Specify, by order of appointment, three (3) liquidators in the event of death of the original liquidator(s), refusal of office, resignation or legal incapacity to act.
For example, I designate X or, failing him/her, Y or, failing him/her, Z.
- Do you want to compensate your liquidator for discharging their duties in addition to reimbursing them for the expenses that such duties may entail, or do you think your liquidator will do so free of charge?

- If you want to provide compensation, and two liquidators succeed each other, do you want them to share the compensation, or do you want each to receive the specified amount?
- Regarding reimbursement of all expenses incurred by the liquidator in the course of their duties, such as communication costs and travelling expenses, do you also want to reimburse the liquidator for the following expenses?
 - Travelling and accommodation; YES or NO
 - Loss of income: YES or NO
- If you have heirs you consider too young to inherit your property, at what age do you want them to receive their inheritance?

For example, you might specify 100% at age 21, or 30% at age 18, 30% at age 21 and 40% at age 25.
- If an heir has not reached the specified age, whom would you like to appoint as administrator of their inheritance?
- Designate three (3) administrators by order of appointment.

For example, I designate X or, failing him/her, Y or, failing him/her, Z.
- Do you want to compensate the administrator for this duty in addition to reimbursing them for their expenses? If so, specify how much and how the compensation will be shared in the event that administrators succeed each other.

Appointment of a tutor to minor children (if applicable)

- Specify three (3) tutors by order of appointment.

For example, I appoint X or, failing him/her, Y or, failing him/her, Z.
- Do you want the tutor to live in your home free of charge so that your children will not have to move?

- Do you want to allow the tutor to acquire a larger vehicle with funds from the children's inheritance?
- Do you want to allow the tutor to renovate or enlarge their own house to accommodate your children, using funds from the children's inheritance?
- Do you want to compensate the tutor in addition to their expenses? YES or NO. If so, how much?
- If you provide compensation, and two tutors succeed each other, do you want them to share the compensation, or do you want each to receive the specified amount?
- Do you have specific instructions for the tutor (optional), such as the values you want to be conveyed to your children?

Reading of the will

- Does the will have to be read before a notary? YES or NO

Comments

- Bring a short inventory of your assets and liabilities as well as your life insurance policies.
- Bring two (2) pieces of identification (health insurance card, driver's licence, social insurance card, passport).
- If you are divorced, bring your divorce certificate.
- If you are married, bring your marriage contract or your marriage certificate if you have no marriage contract.
- If you are widowed, bring your spouse's death certificate.
- Bring your previous will, if applicable.



If you have any questions, don't hesitate to contact us

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