



Fleury, Comery LLP  
Barristers & Solicitors

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## PERSONAL DATA SHEET FOR WILLS & POWERS OF ATTORNEY

(1) FULL NAME:

(2) FULL NAME:

Address:

Address:

Tel. (Home & Bus./Cell)

H:

B:

H:

B:

Date & Place of Birth:

Occupation:

Marital Status & Spouse  
(if not named above):

Children/Date(s) of Birth  
& Address(es):

**ASSETS:** list your major assets and values. Include real estate, bank accounts, RRSP's. If jointly owned, please indicate "joint". e.g. "House (Jt) \$300K"

**LIABILITIES:** list your major liabilities. Include mortgages & lines of credit.

**WILL INSTRUCTIONS:**

1. Executor(s):

2. Special Gifts?

3. Residue to..?

4. Any special clauses?  
e.g. - guardianship of children -personal effects

5. Other matters to be reviewed:

Storage of will. Disabled beneficiaries. Illegitimate children. Family law clause. Executor powers. Tax liability on RRSP's. Funeral instructions.

**CONTINUING POWERS OF ATTORNEY:**

Yes

No

Yes

No

-Attorney for Property:  
-Substitute attorney:

-Attorney for Care:  
-Substitute attorney: