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TRUST QUESTIONNAIRE

INFORMATION ABOUT YOU:

DATE: _____

1. My full name is: _____
(First Name) (Middle Name) (Last Name)

2. My home address is: _____
(Street Address) (City)

(Province) (Postal Code)

3. My birthday is: _____
(Month) (Day) (Year)

4. I have a will: Yes _____ No _____

5. I need a will: Yes _____ No _____

6. I am working: F/T _____ P/T _____ As a Volunteer _____

7. My job is: _____

8. I get paid \$ _____ every month for my job.

9. I am receiving money from the government: Yes _____ No _____

10. I started getting government money at age: _____

Every month I get \$ _____ from the government

11. My government money comes from:

B.C. Disability Benefits: _____

CPP Pension Plan: _____

ICBC Settlement Payments: _____

Other: _____

12. My disability is: _____

13. My doctor is: _____
(Name) (Phone)

(Address)

14. I have completed the list of my assets: Yes _____ No _____

15. My total assets are worth \$ _____

16. My closest relatives are:

Family Member No. 1

Family Member No. 2

(Name)

(Name)

(Address)

(Address)

(Relationship) (Age)

(Relationship) (Age)

REASONS FOR A TRUST:

17. I want to set up a trust now because of money from:

a) \$ _____ from my own money

OR

b) \$ _____ from an inheritance from my _____ and she/he is still alive.

She/He already died on: _____ and the Executor's

name is _____
(Name)

(Address)

OR

c) \$ _____ from an accident settlement from:

(i) _____ ICBC.

(ii) _____ another insurance company.

(iii) _____ someone else.

OR

d.) \$ _____ from a court settlement for _____
(reason)

(i) _____ still in court.

(ii) _____ somewhere else.

(iii) _____ already in court.

OR

Other _____

18. I expect that my trust fund will have a total of \$ _____

19. I want to set up a trust now because:

(i) I want to keep my government benefits: _____

(ii) I want to get my government benefits again: _____

(iii) I want to start getting government benefits: _____

TERMS OF MY TRUST:

TRUSTEES:

20. I would like to have these people as the trustees of my trust:

Trustee No. 1

(Name)

(Address)

_____/_____
(Job) (Relationship)

Trustee No. 2

(Name)

(Address)

_____/_____
(Job) (Relationship)

Trustee No. 3

(Name)

(Address)

(Job)

(Relationship)

21. I would like some of the Trustees to act together:

Trustees to act together: _____
(Name(s))

22. I would like some of the Trustees to only be Trustees if others cannot do it::

Trustees to be alternatives: _____
(Name)

BENEFICIARIES:

23. I would like to be the only person who can get the money from the trust

during my lifetime. Yes _____ No _____

24. When I die, I want my trust to go to my closest relatives.

Yes _____ No _____

If yes: wife/husband and children _____

Grandchildren _____

Mother and father _____

Brothers and sisters _____

25. When I die I want my trust to go to someone else (not my closest relatives).

OTHER TERMS OF THE TRUST:

26. When my Trustees invest in my trust, I want them to be restricted to investments like bank accounts, term deposits, G.I.C's, and Canada Savings Bond.

Yes_____

No_____

Or

I want my Trustees to have unrestricted powers so they can invest in whatever they think is a good investment. Yes_____ No_____

27. I may want to be able to borrow money from my trust to buy a home.

Yes_____

No_____

28. I want my Trustees to be able to make complicated business deals like investing in private companies or buying real estate or carrying on a business.

Yes_____

No_____

29. In the future, I want to be able to change the Trustees of my trust.

Yes_____

No_____

MY ASSETS:

Bank Accounts:

30. I have \$_____ in the bank account(s) at:

(Name of first bank, trust company, or credit union)

31. I have \$_____ in the bank account(s) at::

(Name of the second bank, trust company, or credit union)

Investments:

32. I have other money or investments at:

_____/_____
(Name of financial institution) (Amount)

33. I have RRSP's at:

(Name of financial institution) (Amount)

Real Estate

34. I own my home: Yes _____ No _____

If yes:

I bought or inherited the home on _____
(Date)

My home is worth: _____

My mortgage balance is: _____

I live in the home with:

_____/_____
(Names) (Relationship)

_____/_____
(Names) (Relationship)

35. My name is on other real estate, e.g.: parents home

Yes _____ No _____

Details: _____

Life Insurance:

36. I have life insurance with:

_____/_____

(Name of insurance company)

(Amount)

Personal Effects and other Assets:

37. Besides the "usual" furniture, clothes and household items, I also own:

(Item – e.g.: car)	(Value)
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(Item)	(Value)
--------	---------

(Item)	(Value)
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Outside British Columbia:

38. I do not own anything outside British Columbia:

Yes _____

No _____

Total:

39. My total assets are worth \$ _____

Debts:

40. I owe \$ _____ to _____
(Amount) (Name of first creditor)

I owe \$ _____ to _____
(Amount) (Name of the second creditor)