

*Janice Rutherford*

NOTARY PUBLIC INC.

*A Member of The Society of Notaries Public of British Columbia*

**Pre Will Interview Checklist**

What you will need to bring to your appointment:

- 2 pieces of Government issued identification (one must have a photograph);
- Assessment notices for any property that you own;
- Full legal names and addresses for potential Executors, Guardians and Beneficiaries;
- If you are planning on making a donation to any charities, ensure that you have the charities name and their registered charitable number;
- If you own a business, ensure that you bring any important information about the business such as name, shareholder information etc.;
- Any Co-Habitation Agreement or Separation Agreement, if applicable;

What you will need to know for your appointment:

- Approximate values of your financial assets, including but not limited to personal bank accounts, registered investments, non-registered investments, life insurance policies, and foreign assets;
- Any beneficiaries already designated for the above;
- Personal debt information, for example personal lines of credit, credits cards etc.;
- Whether you have a Will, Power of Attorney or Representation Agreement in any other jurisdiction (could be within Canada or outside of Canada) – if you are able to, please bring a copy;
- If you have been appointed as a Guardian in any other person's Will;

If you have any questions regarding the above information, please feel free to contact the office at 250-372-1711.

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