

My Estate Planning Objectives



Client Name:

The following exercise will have you define the objectives you wish to achieve in your estate plan, and to prioritize those objectives. You should complete this exercise alone, then compare your results to those of your spouse (if applicable)

Step 1: Read each of the following statements. In the context of your family, your estate, your values, and your goals, indicate whether the statement is Very Important, Desirable, Not Important, or Not Applicable to you.

Step 2: Circle the statements that you indicate are Very Important to you. There should not be more than 10. Now rank those statements from 1 (Most Important) to 10 (Least Important).

Statement:	Step 1 1= Very Important 2= Desirable 3= Not Important 4= Not Applicable	Step 2 Rank 1 (Very Important)- 10 (Least Important)
I want to protect one or more family members who are vulnerable.		
I want to ensure that my family can maintain the same lifestyle after my death.		
I want to protect my children's inheritance in the event that their marriage breaks down.		
I want to protect my children's inheritance in the event that my spouse remarries after my death.		
I want to choose who will make decisions on my behalf, should I become incapacitated.		
I want to distribute my estate equally between my children, regardless of their circumstances.		
I want to provide for my family members based upon what I perceive to be their individual needs.		
I want to transfer personal property with sentimental values to the people who will appreciate it most.		
I want to make gifts to family members and other while I am alive to see them enjoy the gift.		

I want to ensure that my heirs do not lose their personal initiative by receiving too much money as an inheritance.		
I want to enjoy my money while I am alive.		
I want my heirs to receive their inheritance after they are old enough to handle it responsibly		
I want to maximize the value of my estate in case I need the money before I die.		
I want to maximize the value of my estate so I can leave as much as possible to my beneficiaries.		
I want my beneficiaries to understand that an inheritance is a gift and to be grateful for whatever they receive.		
I want to pass on my philanthropic values to my children.		
I want to simplify my financial affairs to make it easier for my executor to settle my estate.		
I want to organize my financial affairs so my power of attorney and executor can act on my behalf with the minimal amount of time and effort.		
I want to ensure that my will and other estate planning cannot be challenged.		
I want to provide financial security to my spouse for the remainder of his/ her lifetime even if it means my children inherit nothing.		
I want to provide financial security to my spouse for the remainder of his/ her lifetime, while ensuring my children eventually inherit something.		
I want my spouse to inherit everything we own for his/her own use without any restrictions.		
I want to distribute my estate fairly between my spouse and my children.		
I do not need to provide for my spouse because our assets are separate.		
I want to treat my common - law partner as if we were married.		
I want to provide financial security for my heirs until they are old enough to provide for themselves.		
I want all of my children / heirs to benefit equally from my estate.		
I want one or more of my children / heirs to receive more from my estate than others.		
I want to leave my estate to people of purposed other than my children or heirs.		
I want to nominate guardians for my minor children.		

I want to ensure that money is available to pay for my heirs' education.		
I want to protect an inheritance for my children from a previous marriage.		
I want to provide a favourite charitable organization during my lifetime.		
I want to provide for a favourite organization after my death.		
I want to ensure that my debts will be paid off on my death.		
I want to ensure that my dependents will have sufficient cash readily available to them shortly after my death.		
I want to ensure that sufficient cash is available to cover my estate settlement expenses.		
I am concerned that I might not have the right amount of life insurance.		
I want to keep the vacation property in the family.		
I want the vacation property to be sold as a source of funds in my estate.		
I want to ensure continuity of the family business.		
I want to make an orderly exit from the family business while I am alive.		
I want my executor to make an orderly exit from the family business after I die.		
I want to give my children the future growth in value of the business.		
I want to reduce my family's total taxes by allocating income in the best way.		
I want to minimize the amount of taxes, including probate fees, owing upon my death.		
I want to minimize all costs and fees required to settle my estate.		
I do not want my spouse to be burdened by dealing with financial matter immediately after my death.		
I want someone who is impartial and informed to handle my estate.		
I want to know that my trustee will be available for a long time after my death.		
I want to: (insert your own words)		
I want to: (insert your own words)		

Choose one:

- 1) My Spouse / Partner and I agree that the information contained in our respective questionnaires may be compared for the purpose of identifying area where our estate planning objectives are different.

Signature 1

Signature 2

Date

Date

- 2) I do not wish to share my estate planning objective with my spouse/ partner. Please keep the information in my questionnaire confidential.

Signature

Date

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