



Estate Planning Checklist

This checklist was developed to help you prepare for creating your Will. When you've completed a section simply check it off your list and you are one step closer to starting the process.

Please note this document is a guideline. We recommend speaking with a professional when you are ready.

Name

Date of Birth

Current Address:

Contact info

Lawyer/Notary:

List your assets and liabilities

Real Estate:

Personal Items:

Bank Account(s):

Digital Asset(s):

Mortgage(s):

Loan(s):

Credit Card(s):

Other:

List your beneficiaries

Dependents:

Family:

Friend(s):

Charitable Organization(s):

Determine how you would like to divide your estate among those listed above.

Consult with a tax professional

Although this step isn't necessary it will allow you to understand the tax impact on your estate given the decisions you have made for the above. For example leaving a charitable donation could reduce the tax owed by your estate.

Speak to and determine Guardian(s)

This is important should you have minors. Before writing a name down in your Will be sure to have a conversation with the person(s) you select. It is critical that they are in agreement with and support your plans.

Select and speak to your executor(s)

Have a conversation with the person(s) you've selected as an executor. You may also want to determine a back up should your first choice not be available. Be sure to provide your executor(s) locations and background of your assets, as well as a list and contact information for all key people.

Select a Power of Attorney

For both property and personal care. Also ensure they are aware of your intentions.

Seek out a professional or write your Will Online

If you would like some more information on World Animal Protection or leaving a gift in your Will please contact us via email at mylegacy@worldanimalprotection.ca or give us a call at 1 800 363 9772 ext 122.

World Animal Protection
960 - 90 Eglinton Ave E
Toronto, ON M4P 2Y3
Canadian Charitable Registration #12971 9076 RR0001

