



Last Will & Testament Planning Worksheet (Canada)

For use as an information-gathering outline and discussion aid with your lawyer.

Not a substitute for legal advice or a lawyer-drafted will.

Prepared by: Heritage Legacy Financial

Date: _____ Client(s): _____

Important notes

- This worksheet helps you record your wishes and gather details needed to draft or update a will. It is not, by itself, a valid will.
- Rules differ by province and by personal circumstances. Final drafting and execution should be completed with a lawyer qualified in your province.
- Many assets do not pass through a will (for example: joint assets with right of survivorship, life insurance or registered plans with named beneficiaries, and certain trust assets). Review your beneficiary designations as part of your plan.
- Do not write passwords or private keys in any document that may be shared or stored openly. Use a secure inventory (see the Digital Estate section).

DISCLAIMER: This Wills Preparation Kit (the “Kit”) is provided solely as an information-gathering and planning aid to assist residents of Alberta and British Columbia in organizing their estate-planning intentions and related details. The Kit is not legal advice, does not create a solicitor-client relationship, and is not a substitute for advice from a qualified lawyer (or, in British Columbia, a notary) or other professional advisors.

Laws and recommended practices vary by jurisdiction and may change over time. While reasonable efforts have been made to present information believed to be accurate and current as of the publication date, no representation or warranty is made as to the completeness, accuracy, or ongoing applicability of the contents.

Use of the Kit is at the user's own risk. To the fullest extent permitted by law, the author and distributor disclaim any and all liability for any loss, damage, claim, cost, or consequence (whether direct, indirect, incidental, special, or consequential) arising from or related to the use of, reliance on, or misuse of the Kit, including without limitation any errors or omissions, or any failure to obtain legal advice.

1) Jurisdiction and will validity checklist

Province of primary residence at signing (select one):

☐ British Columbia ☐ Alberta ☐ Other: _____

High-level execution requirements (confirm with your lawyer):

- In writing; signed by the will-maker at the end; witnessed and signed by two adult witnesses who are present at the same time.
- Witnesses should be independent (not beneficiaries and not the spouse/partner of a beneficiary) to avoid invalid gifts and later disputes.
- Keep the original signed will in a secure place, and ensure the executor can locate it quickly.

Capacity and intent (initial each):

I understand what a will is and what it does.	Initials:
I understand the nature and approximate value of my property.	Initials:
I understand who may reasonably expect to benefit from my estate.	Initials:

2) Will-maker information

Full legal name	
Preferred name (if different)	
Date of birth (YYYY-MM-DD)	
Current address	
Phone / Email	
Citizenship / residency (if relevant)	
Marital status	☐ Single ☐ Married ☐ Common-law ☐ Separated ☐ Divorced ☐ Widowed
Spouse/partner name (if any)	

If there are two spouses/partners making separate wills, complete a separate worksheet for each.

3) Family, dependants, and key relationships

List all children (including adult children, adopted children, and children from prior relationships).

Name	DOB	Relationship	Lives with	Notes (special needs, dependency, etc.)

Other dependents or obligations (for example: support payments, dependent adult, parents):

4) Executor and trustee appointments

Your executor is responsible for administering your estate. A trustee manages any trusts created under your will (often the same person).

Primary executor/trustee	Name: Relationship:
Primary executor contact	Phone: Email:
Alternate executor/trustee	Name: Relationship:
Alternate contact	Phone: Email:
Professional support	☐ Lawyer ☐ Trust company ☐ Accountant ☐ Financial planner
Compensation preference	☐ Standard executor compensation per provincial practice ☐ Waive ☐ Other:

Special executor powers you want considered (check all that apply):

- ☐ Sell real property without further consent
- ☐ Operate or wind up a business / farm operation
- ☐ Borrow funds / refinance to pay taxes
- ☐ Continue discretionary investment management
- ☐ Make charitable donations consistent with my wishes
- ☐ Other: _____

5) Guardianship (minor children)

If you have minor children, discuss guardianship with your lawyer. Guardianship appointments can be complex and may interact with family law.

Do you have minor children?	☐ Yes ☐ No
Preferred guardian	Name: Relationship:
Alternate guardian	Name: Relationship:
Guardian contact details	Phone/Email:

6) Funeral, remains, and personal directives (non-binding)

These wishes are often placed in a separate letter of wishes so they can be updated without changing the will. Confirm local rules and practical steps with your executor.

Burial/cremation preference: ☐ Burial ☐ Cremation ☐ Other:

Location and arrangements:

Organ/tissue donation: ☐ Yes ☐ No ☐ Already registered

7) Specific gifts and legacies

List specific items or amounts you want to leave to particular people or charities.
(Examples: family heirlooms, vehicles, cash gifts, charitable donations.)

Item / Amount	Beneficiary	Alternate Beneficiary (if first predeceases)	Notes

8) Residue of estate (everything not gifted elsewhere)

Choose the general distribution approach for the balance of your estate after debts, taxes, and specific gifts.

- ☐ To my spouse/partner, if living, otherwise to my children
- ☐ To my children in equal shares (or as listed below)
- ☐ Other distribution (describe):

Distribution method (discuss with your lawyer): ☐ Per stirpes ☐ Per capita

☐ Other:

If children predecease you, should their share go to their children (your grandchildren)?

☐ Yes ☐ No

9) Trusts for minors or vulnerable beneficiaries

If a beneficiary is under the age of majority, a trust is commonly required. You can also create trusts for staged distributions or for beneficiaries who need protection.

Hold gifts in trust until age	Age: _____ (Common choices: 18, 21, 25)
Staged distributions?	☐ No ☐ Yes (example: 1/3 at 21, 1/3 at 25, balance at 30)
Trustee for minor/vulnerable beneficiaries	Name: Relationship:
Alternate trustee	Name: Relationship:
Permitted payments while in trust	☐ Health ☐ Education ☐ Maintenance ☐ Other:
Direction for investing trust funds	

10) Real estate and property instructions

List your real estate and any specific instructions (sell vs. transfer, who lives there, equalization among beneficiaries).

Property (address/description)	Ownership (sole/joint/tenant-in-common)	Instruction (sell/transfer/other)	Beneficiary/notes

11) Business, farm, and corporate interests

If you own a business, farm, corporation shares, or partnership interests, note how you want succession handled and who should receive control.

Key details (entity name, share structure, partners, buy-sell agreement, insurance):

Instructions (sell, transfer, continue operations temporarily, appoint manager):

12) Debts, taxes, and equalization

Your will can direct how taxes and debts are paid and whether beneficiaries must contribute proportionately. Confirm with your lawyer and tax advisor.

Pay debts and expenses from	☐ Residue ☐ Proportionately from gifts ☐ Other:
Tax equalization desired?	☐ Yes (discuss strategy) ☐ No / Not sure
Charitable gifting for tax planning?	☐ Yes ☐ No ☐ Maybe
Notes / priorities	

13) Digital estate and digital bequeathments

Digital assets may have monetary value (for example: cryptocurrency, online businesses, domain names, royalties) and/or personal value (photos, messages). Some accounts are non-transferable under provider terms of service; your executor may instead need to memorialize, close, or download content where permitted.

Digital executor (optional)	☐ Same as executor ☐ Different person (name):
Digital executor contact	Phone: Email:
Primary goals (check all)	☐ Preserve photos/files ☐ Close accounts ☐ Memorialize profiles ☐ Transfer business assets
Authority requested	☐ Access, manage, and close digital accounts where permitted; ☐ Obtain records; ☐ Deal with service providers
Password manager / vault	Tool type (ie. App, Book, USB Drive, Cloud, etc.): Location: Recovery method:
Two-factor authentication	Phone/email used for codes:
Where a separate inventory is stored (do not include passwords here):	

Digital account actions (complete what applies):

- Email accounts: ☐ Provide access to executor ☐ Delete ☐ Archive/download data
- Social media: ☐ Memorialize ☐ Delete ☐ Transfer page admin rights (business pages)
- Photo/video storage (iCloud/Google Photos/Dropbox): ☐ Transfer copies to family ☐ Delete after download
- Domains/websites/online store: ☐ Transfer ownership ☐ Sell ☐ Shut down
- Subscriptions/memberships (Netflix, Spotify, apps): ☐ Cancel ☐ Maintain until ____
- Crypto / digital wallets: ☐ Transfer to _____ ☐ Liquidate ☐ Other: _____

Digital Assets Inventory (keep separately; update as needed):

Category	Provider / account name	Where access info is stored	Action at death	Beneficiary / notes

14) Document storage and key contacts

Lawyer / firm (if any)	
Accountant	
Location of original will (once signed)	
Location of POA / Representation Agreement	
Safe deposit box?	☐ No ☐ Yes (bank/branch): Box #:
Who knows where documents are stored?	

15) Signing and witnessing checklist (for your lawyer appointment)

- ☐ Final will is printed as a complete document (no missing pages).
- ☐ Sign at the end, in ink, using your usual signature. Initial at the bottom of each page.
- ☐ Two adult witnesses are present at the same time and watch you sign; each witness signs and initials in your presence and in the presence of the other witness.
- ☐ Witnesses are not beneficiaries and not the spouse/partner of a beneficiary.
- ☐ Initial any handwritten changes (ideally avoid changes; reprint if needed).
- ☐ Consider an Affidavit of Execution to simplify probate (lawyer can arrange).

Notes/questions for your lawyer:

The following resources were referenced in compiling this Kit:**British Columbia**

1) Province of British Columbia (BC Laws). Wills, Estates and Succession Act, SBC 2009, c 13.

https://www.bclaws.gov.bc.ca/civix/document/id/complete/statreg/09013_01

Accessed: January 8, 2026.

2) Province of British Columbia. Wills Registry (Vital Statistics Agency): overview, register the location of a will (Wills Notice), and searches.

<https://www2.gov.bc.ca/gov/content/life-events/death/wills-registry>

Accessed: January 8, 2026.

3) Province of British Columbia (Vital Statistics). Electronic Wills System (eWills): register/search Wills Notices.

<https://ewills.vs.gov.bc.ca/>

Accessed: January 8, 2026.

4) Province of British Columbia. Vital Statistics: Wills Registry summary and links.

<https://www2.gov.bc.ca/gov/content/family-social-supports/seniors/health-safety/health-care-programs-and-services/vital-statistics>

Accessed: January 8, 2026.

5) Clicklaw (Courthouse Libraries BC). “How do I make a will?” (includes links to authoritative BC drafting checklists and resources).

<https://www.clicklaw.bc.ca/common-questions/how-do-i-make-will>

Accessed: January 8, 2026.

6) Law Society of British Columbia. Practice Checklists Manual – Will-Maker Interview (includes prompts re: digital assets and non-transferability concerns).

<https://www.lawsociety.bc.ca/Website/media/Shared/docs/practice/checklists/g-2.pdf>

Accessed: January 8, 2026.

7) Law Society of British Columbia. Wills (practice resource; includes administration steps referencing safeguarding valuables, including digital assets).

<https://www.lawsociety.bc.ca/getmedia/d20e9335-483f-4b80-95d0-c599c9d32110/Wills.pdf>

Accessed: January 8, 2026.

Alberta

8) Government of Alberta. Wills in Alberta (formal will requirements; holograph will definition).

<https://www.alberta.ca/wills-in-alberta>

Accessed: January 8, 2026.

9) Government of Alberta. Deceased persons' estates (locating a will; notes on wills storage and that there is no provincial will registry).

<https://www.alberta.ca/deceased-persons-estates>

Accessed: January 8, 2026.

10) CanLII. Wills and Succession Act, SA 2010, c W-12.2 (consolidation).

<https://www.canlii.org/en/ab/laws/astat/sa-2010-c-w-12.2/latest/sa-2010-c-w-12.2.html>

Accessed: January 8, 2026.

11) Government of Alberta (Open Government). Saying Farewell: A practical guide (includes will-signing basics and witness cautions).

<https://open.alberta.ca/dataset/a15cb3f2-59f6-4633-aec3-f8d8fe4edaa6/resource/5798935c-0d25-4d7e-8468-91dc85d80774/download/saying-farewell-dying-process-guide.pdf>

Accessed: January 8, 2026.

12) Alberta Will Registry (private registry service – location/details registry, not a government Vital Statistics registry).

<https://www.albertawillregistry.ca/>

Accessed: January 8, 2026.

Digital estate / digital bequeathments (Canada)

13) Uniform Law Conference of Canada (ULCC). Uniform Access to Digital Assets by Fiduciaries Act (background and purpose).

<https://ulcc-chlc.ca/Civil-Section/Uniform-Acts/Uniform-Access-to-Digital-Assets-by-Fiduciaries-Ac/Uniform-Access-to-Digital-Assets-by-Fiduciarie-%282%29>

Accessed: January 8, 2026.

- 14) Alberta Law Reform Institute (ALRI). Access to Digital Assets (Final Report 121).

<https://www.alri.ualberta.ca/wp-content/uploads/2024/03/FR121.pdf>

Accessed: January 8, 2026.

- 15) Canadian Bar Association (Alberta). Making a Will (public legal information; includes digital assets considerations).

<https://cba-alberta.org/public/making-a-will/>

Accessed: January 8, 2026.

- 16) BMO Private Wealth – Insights. Why you need to include your digital assets in your estate plan (planning considerations, MFA/password realities).

<https://privatewealth-insights.bmo.com/en/insights/estate-trust/why-you-need-to-include-your-digital-assets-in-your-estate-plan/>

Accessed: January 8, 2026.

- 17) Facebook Help Center. Legacy Contacts (overview of legacy contact functions for memorialized profiles).

<https://www.facebook.com/help/1506822589577997>

Accessed: January 8, 2026.

- 18) Facebook Help Center. Request to memorialize or remove an account (process overview).

<https://www.facebook.com/help/1111566045566400/request-to-memorialize-or-remove-an-account>

Accessed: January 8, 2026.