

East Kootenay Community Financial Services Ltd.

Estate Planning Needs Assessment Questionnaire

Please respond to the following questions by ticking the appropriate answer and entering the score for your answer on the line opposite the question.

Do you currently have a Will?

- yes (2) no (5) _____

Select your age group

- 18 to 30 (2) 61 to 75 (6)
 31 to 45 (4) over 75 (7)
 46 to 60 (5) _____

Select the marital status that most closely resembles your current situation:

- never married (2) divorced (6)
 1st marriage (6) common-law relationship (9)
 2nd (or subsequent) marriage (6) same-sex (9)
 separated (9) widowed (2) _____

Select your occupational category that best describes your current situation:

- employee (4) owner-operator of an
 homemaker (4) unincorporated business (15)
 self-employed (15) owner/primary shareholder of
 retired (2) limited company (15) _____

Select the response that best describes how the majority of your assets are registered:

- joint with my spouse/partner (legal, common-law, etc.) (4) joint with another individual (not a spouse or partner) (7)
 solely in my name (9) many different ways (8) _____

Describe your children:

- none (0) I have no children, but there are
 all are adults (4) children residing in my home (6)
 some/all under age of majority (15) _____

Describe the people who are financially dependent on you:

- no one (0) spouse/partner and children (7)
 spouse/partner (2) adult children (7)
 children under the age of majority (6) other (7) _____

In the event of death, what is the likelihood that there would be conflict among your beneficiaries and/or your other family members:

not at all likely (2)

very likely (9)

somewhat likely (4)

almost inevitable (15)
