TRUST QUESTIONNAIRE

FOR

KMK LAW CORPORATION

INFORMATION ABOUT YOU:

DATE: _____

1. My full name is:_____
(First Name) (Middle Name) (Last Name)

2. My home address is:_____
(Street Address) (City)

_____
(Province) (Postal Code)

3. My birthday is:_____
(Month) (Day) (Year)

4. I have a will: Yes_____ No_____

5. I need a will: Yes_____ No_____

6. I am working: F/T_____ P/T_____ As a Volunteer_____

7. My job is:_____

8. I get paid $ _____ every month for my job.

9. I am receiving money from the government: Yes_____ No_____

10. I started getting government money at age:_____

Every month I get $ _____ from the government

11. My government money comes from:

B.C. Disability Benefits:_____

CPP Pension Plan:_____

ICBC Settlement Payments:_____

Other:_____

12. My disability is:_____

13. My doctor is:_____
(Name) (Phone)

_____
(Address)

14. I have completed the list of my assets: Yes_____ No_____

15. My total assets are worth $ _____

16. My closest relatives are:

Family Member No. 1	Family Member No. 2
_____	_____
(Name)	(Name)
_____	_____
(Address)	(Address)

_____ _____
(Relationship) (Age) (Relationship) (Age)

REASONS FOR A TRUST:

17. I want to set up a trust now because of money from:

a) $ _____ from my own money

OR

b) $ _____ from an inheritance from my _____ and she/he is still alive.

She/He already died on: _____ and the Executor's name is _____
(Name)

_____
(Address)

OR

c) $_____ from an accident settlement from:

(i) _____ ICBC.

(ii) _____ another insurance company.

(iii) _____ someone else.

OR

d.) $ _____ from a court settlement for_____
(reason)

(i) _____ still in court.

(ii) _____ somewhere else.

(iii) _____ already in court.

OR

Other _____

18. I expect that my trust fund will have a total of $ _____

19. I want to set up a trust now because:

(i) I want to keep my government benefits:_____

(ii) I want to get my government benefits again:_____

(iii) I want to start getting government benefits:_____

TERMS OF MY TRUST:

TRUSTEES:

20. I would like to have these people as the trustees of my trust:

Trustee No. 1

_____
(Name)

_____
(Address)

_____/_____
(Job) (Relationship)

Trustee No. 2

_____
(Name)

_____
(Address)

_____/_____
(Job) (Relationship)

Trustee No. 3

_____

(Name)

_____

(Address)

_____/_____

(Job) (Relationship)

21. I would like some of the Trustees to act together:

Trustees to act together: _____

(Name(s))

22. I would like some of the Trustees to only be Trustees if others cannot do it::

Trustees to be alternatives:_____

(Name)

BENEFICIARIES:

23. I would like to be the only person who can get the money from the trust during my lifetime. Yes_____ No_____

24. When I die, I want my trust to go to my closest relatives.

Yes_____ No_____

If yes: wife/husband and children_____

Grandchildren_____

Mother and father_____

Brothers and sisters_____

25. When I die I want my trust to go to someone else (not my closest relatives).

OTHER TERMS OF THE TRUST:

26. When my Trustees invest in my trust, I want them to be restricted to investments like bank accounts, term deposits, G.I.C's, and Canada Savings Bond.

Yes_____ No_____

Or

I want my Trustees to have unrestricted powers so they can invest in whatever they think is a good investment. Yes_____ No_____

27. I may want to be able to borrow money from my trust to buy a home.

Yes_____ No_____

28. I want my Trustees to be able to make complicated business deals like investing in private companies or buying real estate or carrying on a business.

Yes_____ No_____

29. In the future, I want to be able to change the Trustees of my trust.

Yes_____ No_____

MY ASSETS:

Bank Accounts:

30. I have $_____ in the bank account(s) at:

_____

(Name of first bank, trust company, or credit union)

31. I have $_____ in the bank account(s) at::

_____
(Name of the second bank, trust company, or credit union)

Investments:

32. I have other money or investments at:

_____/_____
(Name of financial institution) (Amount)

33. I have RRSP's at:

_____
(Name of financial institution) (Amount)

Real Estate

34. I own my home: Yes_____ No_____

If yes:

I bought or inherited the home on_____
(Date)

My home is worth:_____

My mortgage balance is:_____

I live in the home with:

_____/_____
(Names) (Relationship)

_____/_____
(Names) (Relationship)

35. My name is on other real estate, e.g.: parents home

Yes_____ No_____

Details:_____

Life Insurance:

36. I have life insurance with:

_____/_____
(Name of insurance company) (Amount)

Personal Effects and other Assets:

37. Besides the "usual" furniture, clothes and household items, I also own:

(Item – e.g.: car) (Value)

(Item) (Value)

(Item) (Value)

Outside British Columbia:

38. I do not own anything outside British Columbia:

Yes_____ No_____

Total:

39. My total assets are worth $ _____

Debts:

40. I owe $ _____ to _____
(Amount) (Name of first creditor)

I owe $ _____ to _____
(Amount) (Name of the second creditor)