

Mr & Mrs Sample

Insight 360° No Tomorrow Test



CURRENCY OF WILL

Current

DATE OF WILL

March 15, 2024

POA / HEALTH DIRECTIVE

Active / Updated

EXECUTOR STRUCTURE

Spouse, then Children

Asset Distribution Summary:

Asset / Liability	Goes To (Beneficiary/Estate)	Probate	Processing Time (Est.)
Principal Residence (Joint Tenancy)	Spouse (Right of Survivorship)	NO	Immediate (Upon Death Certificate)
Vacation Property (Sole Name)	Estate (Will Instructions)	YES	6 – 12 Months
Life Insurance (Named Beneficiary)	Spouse / Children	NO	2 – 4 Weeks
RRSP / RRIF (Named Beneficiary)	Spouse (Rollover)	NO	2 – 4 Weeks
Non-Reg Investments (Sole Name)	Estate (Will Instructions)	YES	6 – 12 Months
Corporate Shares (Private Co.)	Estate / Secondary Will	NO (IF DUAL WILL)	3 – 6 Months
Bank Accounts (Joint)	Spouse (Right of Survivorship)	NO	Immediate
Personal Debts / Mortgage	Estate (Paid from Assets)	N/A	Settled During Probate