

Estate Planning Workbook for Canadian Expats

This workbook is designed to help you **organize and visualize your estate holdings** across multiple jurisdictions. As a Canadian expat, you may hold assets in **Canada, the UAE, the UK, the U.S., or other countries**. This guide will assist you in aggregating your assets, structuring your estate plan, and ensuring your wealth is efficiently managed and transferred.

Step 1: Personal & Family Information

Primary Details:

- Full Name:
- Date of Birth:
- Citizenship(s):
- Current Country of Residence:
- Tax Residency Status:
- Marital Status:
- Spouse's Name (if applicable):
- Children's Names & Ages:

Guardianship Plan (If Applicable):

- Have you designated a legal guardian for your minor children? (Yes/No)
- If yes, Guardian's Name:
- Country of Residence:

Retirement & Future Plans:

- Where do you plan to retire? (Canada / Another Country / Unsure)
- If another country, specify:
- Expected timeframe for retirement or leaving the UAE:

Step 2: Aggregating Your Assets by Jurisdiction

A. Real Estate Holdings

Property Location	Type (Primary/Investment)	Ownership Structure (Sole/Joint/Trust)	Estimated Value (CAD)
Canada			
UAE			
UK			

USA

Other: _____

B. Investment & Retirement Accounts

Account Type	Institution	Country	Ownership (Sole/Joint/Beneficiary)	Approx. Value (CAD)
RRSP		Canada		
TFSA		Canada		
RESP		Canada		
LIRA		Canada		
GICs		Canada		
Stocks/Bonds		Canada		
Offshore Investment		UAE/Other		
Other				

C. Cash & Banking Assets

Bank Name Country Account Type (Checking/Savings/Offshore) Approx. Balance (CAD)

Canada

UAE

UK

USA

Other: _____

D. Business Interests

Business Name Country Ownership % Estimated Value (CAD) Succession Plan (Yes/No)

E. Insurance Policies

Policy Type Provider Country Coverage Amount (CAD) Beneficiary

Life Insurance

Disability Insurance

Critical Illness

Other: _____

Step 3: Liabilities & Debts

Debt Type Lender Country Outstanding Balance (CAD) Monthly Payment

Mortgage

Credit Card

Personal Loan

Other

Step 4: Will & Trusts Overview

A. Existing Wills

Will Type Country of Registration Covers Assets in Which Countries? Last Updated

Primary Will

DIFC/ADGM Will

UK Will

Other

B. Trusts & Foundations

Trust Type Country of Registration Beneficiaries Assets Held

Revocable Trust

Irrevocable Trust

Family Trust

Step 5: Succession Planning & Beneficiaries


- Have you appointed an **executor for your will(s)**? (Yes/No)
 - Have you **named beneficiaries** for all your financial assets? (Yes/No)
 - Do you have a **power of attorney** in place for financial and healthcare decisions? (Yes/No)
 - Have you designated a **successor for your business assets**? (Yes/No)
-

Step 6: Next Steps & Review Plan

- ✓ **Schedule an estate planning consultation** to align your documents with tax and legal requirements.
 - ✓ **Ensure tax-efficient structuring** of your assets across jurisdictions.
 - ✓ **Review and update** your estate plan every **3-5 years or after major life events** (e.g., relocation, marriage, inheritance, or business growth).
 - ✓ **Secure and store copies** of all key documents in a safe place, accessible to your executor.
-

Need Expert Guidance?

 Contact bassem.fawzy@elixir-wealth.com for a **complimentary estate planning consultation**.

 Visit www.bassem-fawzy.com for more resources on wealth and estate management for expats.