

# BMO Wills and Executors

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# BMO Wills and Executors

# Detailed tables

## NC1. Which of the following do you think would be required of an executor of a will?

Proportions/Mean: Columns Tested  
(5% risk level) - A/B - C/D/E/F

Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
Notify family and friends of death	442 44%	213 44%	229 44%	29 39%	138 43%	212 46%	62 46%	49 100%
Pay the bills, redirect all mail, cancel subscriptions	676 68%	320 66%	356 69%	38 51%	209 65% C	333 71% CD	97 71% C	49 100%
Interpret what the deceased person really meant in any confusing parts of the will	407 41%	206 43%	201 39%	25 34%	132 41%	197 42%	52 39%	0 -
Review all bank and investment statements and close accounts	679 68%	321 67%	358 69%	38 51%	212 66% C	331 71% C	97 72% C	49 100%
Take care of the deceased's children until they reach the age of majority	115 11%	55 11%	60 12%	7 9%	41 13%	58 12%	10 7%	0 -
File tax return	600 60%	273 57%	327 63% A	30 40%	182 56% C	296 63% CD	92 68% CD	49 100%
Go through personal effects, including clothing	324 32%	161 33%	164 32%	17 23%	100 31%	163 35% C	45 33%	49 100%
Adopt the deceased's pets	36 4%	14 3%	22 4%	2 2%	16 5% F	17 4%	1 1%	0 -
Carry out all of the work on a voluntary basis	147 15%	63 13%	84 16%	6 8%	48 15%	75 16% C	18 13%	0 -
All apply	198 20%	98 20%	100 19%	23 30% EF	72 22%	82 18%	22 16%	0 -
<b>Summary</b>								
Mentioned all correct tasks for executor of a will	49 5%	22 5%	27 5%	2 2%	13 4%	26 6%	8 6%	49 100%

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**NC2. How much time do you think, on average, is required to complete the work involved as an executor?**

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
1-2 months	122 12%	73 15%	49 9%	12 16%	34 11%	62 13%	14 10%	2 5%
3-5 months	202 20%	116 24%	86 17%	15 20%	60 19%	96 21%	31 23%	12 24%
6-12 months	365 37%	154 32%	211 41%	16 21%	118 36%	178 38%	54 39%	23 46%
More than 12 months	171 17%	75 16%	96 19%	9 12%	57 18%	77 17%	28 20%	11 22%
(Dk/Ns)	139 14%	63 13%	76 15%	22 30% DEF	54 17% EF	53 11%	10 7%	2 3%

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**NC3. If someone asked you to be an executor, how do you think you would feel?**

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
Honoured	408 41%	213 44%	195 38%	25 34%	124 38%	189 41%	69 51%	23 46%
Intimidated	91 9%	43 9%	47 9%	9 12%	31 10%	38 8%	12 9%	5 10%
Nervous	257 26%	98 20%	159 31%	22 29%	87 27%	130 28%	18 13%	12 23%
Confident	213 21%	112 23%	101 20%	11 15%	62 19%	109 23%	31 23%	13 27%
(Dk/Ns)	163 16%	74 15%	89 17%	16 21%	59 18%	68 15%	19 14%	5 10%

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**NC4. If you or someone you know has acted as an executor, how would you describe the role based on that experience?**

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
Time consuming	391 39%	172 36%	219 42% A	24 32%	104 32%	196 42% D	66 48% CD	28 58%
Difficult	257 26%	118 24%	139 27%	18 24%	72 22%	126 27%	42 31% D	18 36%
Rewarding	110 11%	53 11%	57 11%	7 9%	31 10%	53 11%	19 14%	8 16%
Confusing	99 10%	37 8%	62 12% A	10 13%	33 10%	47 10%	9 7%	4 9%
Positive	135 13%	68 14%	66 13%	6 8%	40 12%	66 14%	22 16%	7 15%
Stressful	304 30%	130 27%	174 34% A	16 22%	90 28%	151 32% C	47 34% C	21 42%
Not applicable/have not acted as executor and do not know anyone who has	345 34%	176 37%	169 33%	29 39%	133 41% EF	143 31%	40 29%	13 26%

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# Detailed tables

## NC5. What would cause you to decline your role as the executor at the time of death?

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
If I didn't feel that I had the understanding or knowledge to carry out all that is required of me	458	219	239	40	146	217	55	13
	46%	45%	46%	54% F	45%	47%	40%	26%
If I lived in a different province or country	360	182	178	19	102	182	58	26
	36%	38%	34%	26%	31%	39% CD	43% CD	54%
Family or work commitments	156	90	66	5	34	85	32	9
	16%	19% B	13%	6%	11%	18% CD	24% CD	18%
I wasn't aware that I could decline my role as an executor	102	49	53	9	33	48	12	3
	10%	10%	10%	12%	10%	10%	9%	7%
I would never say no	181	78	103	15	63	81	22	11
	18%	16%	20%	20%	20%	17%	16%	22%

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## NC6. When appointing the executor of your own will, who have you chosen/ who would you be most likely to choose?

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
Spouse	304 30%	151 31%	153 30%	27 36%	92 28%	137 29%	48 36%	15 30%
Sibling	178 18%	89 18%	89 17%	8 11%	60 19%	91 19%	18 14%	6 12%
Child	211 21%	79 16%	132 25%	17 22%	77 24%	96 21%	21 15%	17 34%
Friend	105 10%	53 11%	52 10%	7 9%	32 10%	48 10%	18 13%	5 10%
Trust company	9 1%	6 1%	3 1%	1 1%	1 0	5 1%	2 2%	0 -
Lawyer	68 7%	39 8%	29 6%	3 5%	16 5%	34 7%	14 11%	3 6%
Colleague	3 0	3 1%	0 -	0 -	1 0	1 0	1 1%	0 -
Other	40 4%	21 4%	20 4%	2 2%	14 4%	22 5%	3 2%	3 6%
(Dk/Ns)	84 8%	42 9%	41 8%	11 14%	31 9%	32 7%	10 8%	1 2%

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## NC7. Do you have in place any of the following?

Proportions/Mean: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
A will	617 62%	309 64%	309 60%	20 27%	201 62%	296 64%	101 74%	37 76%
A Power of Attorney for your financial affairs	261 26%	129 27%	131 25%	8 11%	74 23%	130 28%	49 36%	19 39%
A Power of Attorney for your healthcare	241 24%	115 24%	126 24%	7 10%	69 21%	121 26%	43 32%	17 35%
Life insurance	681 68%	327 68%	354 68%	33 45%	213 66%	329 71%	105 77%	38 78%
Beneficiary designations on your RRSPs, life insurance and pension plans	656 66%	316 66%	340 66%	29 38%	193 60%	331 71%	103 76%	38 76%
None of the above	123 12%	55 11%	68 13%	30 40%	39 12%	47 10%	8 6%	3 5%

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## NC8. If you die without a will, what happens?

Proportions/Means: Columns Tested (5% risk level) - A/B - C/D/E/F  
Overlap formulae used. \* small base

	Total	GENDER		EDUCATION				Mentioned all correct tasks for executor of a will
		Male	Female	<HS	HS	Post Sec	Univ Grad	
		A	B	C	D	E	F	G
Base: All respondents	1430	662	768	104	466	671	189	72
Weighted	1000	482	518	75*	324	465	136	49*
My estate goes to my spouse	300 30%	146 30%	154 30%	27 36%	99 31%	124 27%	49 36%	12 24%
My estate goes to my kids	94 9%	26 5%	68 13%	12 16%	34 10%	43 9%	6 4%	3 7%
The government gets my estate	63 6%	28 6%	35 7%	9 12%	27 8%	22 5%	4 3%	3 6%
Provincial laws decide what happens	297 30%	168 35%	129 25%	11 14%	82 25%	154 33%	50 37%	22 44%
The court decides what happens	145 15%	71 15%	74 14%	3 4%	47 14%	75 16%	20 15%	6 13%
(Dk/Ns)	101 10%	43 9%	57 11%	13 18%	35 11%	47 10%	6 4%	3 6%