

# Law Offices of Howard S. Dymant

## Recording your Estate Plans for your Heirs



**Dear {First Name},**

Immediately upon the Pandemic locking us into our homes I instituted Zoom™ Meetings with my clients to discuss their Estate Planning, Wills and Powers of Attorney as we could no longer meet in person. My clients liked the fact that, from the comfort of their homes, we could have the same discussions as we did in my Offices. It seemed only days later that the Government of Ontario passed "temporary legislation," now permanent since Jan of 2022, to permit lawyers to sign up their clients' wills and powers of attorney by Zoom™ with the same legal effect as if we were together in my Offices.

Law Society of Ontario regulations as to knowing your client have always been clear but, with Zoom™ these

requirements have been emphasized. Prior to the Pandemic, I would scan my client's driver's licence and credit card. Now I ask my clients to hold up their ID to the camera and I do a screen grab. This gives me the added benefit of having a photo of my clients as well as their ID.

With the ease that Zoom™ sessions can be recorded, I began to think that some clients might like to leave their thoughts as to their bequests in a Video as well as in their written wills. With older clients I have always been very careful to make certain they have capacity and that their instructions make sense in light of their families. Then there are those clients who are insistent upon making a will that treats their family members differently in their wills. Recording the Zoom™ Sessions, with the client's consent and full understanding, seemed to me to be an excellent way to preserve evidence, should the Will be challenged after my clients pass on. This visual record, along with my notes would, in my opinion, discourage litigation from the outset and if not, be strong evidence in any Will Challenge.

I was very pleased see an article just this month penned by Hull & Hull LLP, probably the preeminent Estate Litigation Firm in this Province, wholly supporting this practice of recording Zoom™ Estate and Will planning interviews. To review their excellent article expanding upon the content of this email please feel free to click [here](#). I can always be reached by clicking [here](#).

If I can help you in any other way, please feel free to contact me at:  
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