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Will and Power of Attorney Document Preparation Instructions

Thank you for letting me assist you with drafting your Will and Power of Attorney documents. Here is a list of the basic information which I will be canvassing during our first meeting. Please bring your ID to our appointment, and prepare as much information as possible.

Personal Information:

- Your name and contact information (address, phone, email), date of birth
- Are you a Canadian citizen?
- Copies of previous Wills (if any)
- Copies of any marriage contract, cohabitation agreement, or other spousal/common-law information.

All family and dependent Information:

- Your marital status (past and present), (including common law),
- Your spouse's name and contact information, date and place of birth
- The names and personal information of all your children
- The names and personal information of any/all dependants.

Other bequest information:

- People outside of your family you wish to leave property or money to
- Charities you plan to provide for (if applicable).

*If you are leaving part of your estate to a registered charity, it is possible to arrange it so that the donation is applied to the tax return filed for the year of death or immediately prior year. This can offer tax advantages, but you should seek professional advice to make sure Canada Revenue Agency requirements are met.

Previous will(s):

- Do you have an existing will?
- Does your spouse have an existing will?
- Have you set up a trust to benefit another person? (provide details).

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Information regarding your professional advisors:

- Provide the names and addresses of lawyer(s), accountant, investment advisor, life insurance agent, etc.;
- Are you the executor of any other estate?

Any income information:

- Current annual income from all sources such as employment, business, rent, royalties or other.

All asset information:

- Real estate (location and value) In whose name is the real estate?
- Automobiles, boats, household goods, furniture, machinery, tools, equipment etc.
- Bank accounts, safety deposit boxes (location and in whose name?)
- Bonds and /or shares
- Foreign investments
- Other valuables such as paintings etc.
- Life insurance policies, annuities, RRSPs, RRIFs, RESPs, pensions and investment details
- Any business interests and debts owing from third parties.

Any and all liabilities outstanding:

- Mortgages (amount owing and name of mortgagee)
- Loans, credit card balances, other debts.

Other Wishes:

- Wishes regarding funeral arrangement, religious or not
- Any other information relevant to the will
- Other wishes to be expressed in the Will.

Power of Attorney Appointments:

- If you are alive but unable to, who should look after your finances? If the first person you appoint is unable, who should be the backup?

- If you are alive but unable to, who should make decisions regarding your health care, such as receiving or refusing certain treatments? If the first person you appoint is unable, who should be the backup?

Please note that once the Will and POA documents are drafted, we will need two witnesses to execute the documents. The witnesses cannot be beneficiaries under your Will, nor can they be spouses of the beneficiaries. Once you decide on who your witnesses should be, please provide me with their names, occupations and addresses.

Thank you again for your time. Please let me know if you have any questions.

Sincerely,

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