

**Will & Powers of Attorney**

The process to prepare your Will & Powers of Attorney will involve your completion of this form, one or more review and planning meetings to confirm your instructions, drafting of your documents and an in person signing meeting. This process will generally take a few weeks. I am not able to provide services to you on an urgent basis.

You are asked to complete this form for several reasons - I assess the information you provide to determine if there are any special issues that may require discussion and advice and to have a record as a point in time snapshot of your personal situation for your estate trustee in case you do not keep good financial records or for some reason they are destroyed. It is also to assist with the correct spelling of names, birthdates etc. Please be assured that the information that you provide is confidential.

If you have any difficulties in completing this form, we can discuss it during our first meeting.

**Personal Information**

Name in Full (First, Middle, Last)	
(Also known as, if applicable)	
Address	
If rural, what Township are you in?	
Telephone	
Email Address	
Employer & Occupation	
Date of Birth	
Marital Status & name of any spouse	
Date of Marriage	
Do you have a pre-nuptial agreement or cohab agreement?	
Name(s) of any former spouse(es) & dates of divorce	

**Children** (all children, even if not to be included in your Will)

Name	Birthdate	Resident in Ontario? If not, please specify

Are any of these children NOT your child biologically or legally adopted?

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Details of any support obligations	
Details of any relevant personal situations, e.g. disabled, spendthrift spouse and/or children , poor health, diagnosis of demential/alzheimers	
Residence for Income Tax Purposes	
Name of Accountant, if any	
Name of Investment Advisor, if any	
Name of Insurance Advisor, if any	

## Assets

### Safety Deposit Boxes

Location		
Box Number		
Registered Name		
Location of Key		

### Real Estate you own (principal residence)

Street Address or location	
Names on Title	
Current Market Value , it known	
Mortgage or Line of Credit? Is it insured and paid off if you die?	
Any other real property eg. cottage, hunting camp, rentals?	

### Life Insurance

Company.		
Named Beneficiary(s)		
Amount of insurance		

### Private Pensions

Details (beneficiary, death benefits)
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### **Bank Accounts**

Name of Bank & Branch		
Type of Account (savings/chequing)		
Account number		
Ownership (sole name, joint)		
Approx. Value		

### **Cont'd**

Name of Bank & Branch		
Type of Account (savings/chequing)		
Account number		
Ownership (sole name, joint)		
Approx. Value		

### **Investments (Shares, Bonds, GIC's, RRSP's, TFSA's)**

Name of Bank or Financial Institution		
Type of Investment		
Account number		
Approx. value		
Named Beneficiary, if any		

**Cont'd**

Name of Bank or Financial Institution		
Type of Investment		
Account number		
Approx. value		
Named Beneficiary, if any		

**Automobiles, Boats & Recreational Vehicles – other assets**

Description			
Approx. Value			
Ownership (sole name, joint)			

**Cont'd**

Description			
Approx. Value			
Ownership (sole name, joint)			

**If any of your assets are outside Ontario, please specify**

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**Debts** (other than day to day bills)

Creditor		
Approx. Principal Owing		
Maturity Date		

**Cont'd**

Creditor		
Approx. Principal Owing		
Maturity Date		

**Names of other people or organizations who you are thinking of including in your Will**

Name	Age	Resident in Ontario? If not, please specify

**Out of Scope:**

As I am not a tax lawyer or qualified tax professional, I cannot provide you with tax advice. Tax implications may arise in the course of this engagement and I do not assume any responsibility with respect to any such tax implications. I recommend that your overall estate plan be reviewed with your accountant or other tax professional before signing your Will.

Any legal information or advice given to you will be based on the information you provide to my office regarding the value, ownership and associated tax liability of assets and no independent effort will be made to verify the accuracy of this information unless you instruct me in writing to make such investigations.

Please bring photo identification to our first meeting.

Signature:	
Date:	