

WILLS AND ESTATES PLANNING INFORMATION

In order to properly advise you, we require certain information.

Please complete the attached form in as much detail as possible. If there is insufficient space on this form, please attach additional pages as required.

Note: *This information is being gathered by your advisors solely for the purpose of assisting you with an estate plan. It will be kept strictly confidential. All information you supply will be assumed to be accurate. No attempt will be made to confirm or verify this information.*

PERSONAL INFORMATION

Surname: _____

Given Names (incl. alias): _____

Address: _____

Email: _____ Home Phone Number: _____

Citizenship and/ or Residency: _____ Work Phone Number: _____

Cell Phone Number _____

Workplace and address: _____

Date of Birth: _____ Marital Status: _____

Have you been married previously?: _____

If you are not married but cohabiting with another person, when did the cohabitation commence?

Are you in a common-law relationship which has been registered with Vital Statistics?

YOUR SPOUSE OR COMMON-LAW PARTNER

Surname: _____

Given Names (*incl. alias*): _____

Address *same as above* or _____

Email: _____ Home Phone Number: _____

Citizenship/Residency: _____ Work Phone Number: _____

Workplace and address: _____

Date of Birth: _____ Marital Status: _____

Have you been married previously?: _____

Has your spouse been married previously? _____

FAMILY INFORMATION

Do you have any living children? *(incl. from previous marriage(s))* If yes, please complete the following:

Name	Birthdate	Marital Status	Number of Children

Do you have any deceased children? _____

Are there any step-children in your family? _____

Have you any adopted children? _____

Do any of the persons named above have special needs because of physical or mental infirmity?

Do any of your children/grandchildren owe you money? If so, please provide details.

Have you given any of your children/grandchildren an advance of their share of your estate?

Do any of your children have different residency/citizenship than you or your spouse/partner?

Are you the guardian of any children? _____

Do you currently have trust funds or RESPs for any of your children/grandchildren or any other person?

TAYLOR McCAFFREY
L L P

Do you make ongoing support payments for/to children/former spouse? _____

If yes, how much/often? _____

Do you have a spousal agreement (separation agreement pre-nuptial agreement)? If so please provide a copy _____

Is your Will to be made in contemplation of marriage (i.e. are you or may you soon become engaged to be married)? _____

Have you or your spouse/partner ever participated in assisted reproductive technology (example: in vitro fertilization, sperm donation, etc.)? While this is a very personal question, this information is very important. It may affect who has a claim against your estate and may impact the drafting of your Will and ultimately the administration of your estate.

To your knowledge, has any of the beneficiaries you wish to provide for in your Will ever participated in assisted reproductive technology? _____

Other family you wish to note: _____

Do you have any special income tax planning arrangements (trusts, off-shore investments, etc.)?

STATEMENT OF ASSETS AND LIABILITIES

ASSETS		
REAL ESTATE <i>(provide civic or legal address)</i>	TITLE REGISTRATION <i>(Joint, sole, other)</i>	\$VALUE <i>(Estimated)</i>
Principal Residence: _____		\$ _____
Rental properties: _____		\$ _____
_____		\$ _____
Cottage/holiday property: _____		\$ _____
_____		\$ _____
Farm Land: _____		\$ _____
_____		\$ _____
Assets in a foreign jurisdiction _____		\$ _____
PERSONAL PROPERTY		
ASSETS <i>(LIST TYPE)</i>	REGISTERED NAME <i>(JOINT, SOLE, OTHER)</i>	\$VALUE <i>(ESTIMATED)</i>
Bank accounts: _____		\$ _____
_____		\$ _____
Safety Deposit Box _____		
RRSPs, Annuities, RRIFs <i>(incl. designated beneficiary)</i> : _____		\$ _____
_____		\$ _____
TFSA <i>(incl. designated beneficiary)</i> : _____		\$ _____
Pension: _____		\$ _____
_____		\$ _____
Life Insurance <i>(incl. designated beneficiary)</i> : _____		\$ _____
_____		\$ _____
_____		\$ _____

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Non-Registered Investments: *(Bonds, Stocks, Term Deposits, GICs, Mutual Funds)* _____

_____ \$

_____ \$

If you have shares in a privately held company (i.e. shares not traded on a public stock exchange), please provide a copy of the company's share register and any shareholders' agreement. Are you also a director and/or officer of the company?

ASSETS

(LIST TYPE)

REGISTERED NAME

(JOINT, SOLE, OTHER)

\$VALUE

(ESTIMATED)

RESPs *(incl. intended beneficiary)*: _____ \$

_____ \$

RDSPs *(incl. intended beneficiary)*: _____ \$

Other property

Household and Personal Effects _____ \$

Vehicles *(model and year)* _____ \$

Farm Assets *(incl. quotas, licences, etc.)*: _____ \$

_____ \$

LIABILITIES

VALUE OWING (EST.)

Mortgages: _____ \$

_____ \$

Loans: _____ \$

_____ \$

_____ \$

Other *(Promissory Notes, Personal Guarantees, etc)* _____ \$

_____ \$

INSTRUCTIONS

(Please consider the below questions and we can discuss more fully together).

If you currently have a Will, Power of Attorney, Healthcare Directive or other estate planning documents, please provide a copy.

WILL

APPOINTMENT OF EXECUTORS/GUARDIANS

Executor *(name and relationship to you)* _____

Alternate Executor *(in the event the named Exec. is unable to act)* _____

Guardian of your children while minors: _____

Alternate Guardian: _____

DISPOSITION OF ESTATE

Specific Gifts (list what amount/asset and to whom)

Residue (Please advise who you would like to receive the balance of your estate (e.g. All to your spouse/divided between children etc.). Please list beneficiaries and shares/ percentage each to receive if applicable)

Alternate residual beneficiaries in the event that the named residual beneficiaries have predeceased you

Do you have any concerns about any of the persons named above receiving a large sum of funds?

Do you wish to make any Charitable bequests? If so, list charity and amount of gift (or portion of residue if you wish the charity to be a residual beneficiary)

Other comments:

POWER OF ATTORNEY

Would you like a Power of Attorney? If so, who would you like to appoint? Alternate attorney?

If more than one Attorney how are decisions to be made? (ex. one attorney has final say or majority rules?)

Has any person named above ever declared bankruptcy or been the subject of a bankruptcy or similar proceeding? _____

Is your attorney allowed to be paid for their services? _____

HEALTH CARE DIRECTIVE / LIVING WILL

Would you like a Health Care Directive? If so, who is to make health care decisions on your behalf when you are unable to do so? Do you wish to provide them with any special instructions?

ACKNOWLEDGMENT AND CONSENT TO JOINT RETAINER

We, the undersigned, hereby acknowledge that we have asked, and jointly retained Taylor McCaffrey LLP, to act for both of us and to prepare estate planning documents for us based on our shared understanding of what is to be in each document.

We are advised by Taylor McCaffrey LLP that no information received in connection with these matters from one of us can be treated as confidential so far as the other of us is concerned, and that if a conflict develops between us that cannot be resolved, that Taylor McCaffrey LLP cannot continue to act for both of us and may have to withdraw completely from these matters.

We are also advised by Taylor McCaffrey LLP that, if subsequent to this joint retainer, only one of us were to communicate new instructions (for example, instructions to change or revoke our will), then:

- (a) the subsequent communication would be treated as a request for a new retainer and not as part of the joint retainer;
- (b) Taylor McCaffrey LLP would have a duty to decline the new retainer, unless:
 - (i) we have annulled our marriage, divorced or permanently ended our conjugal relationship, as the case may be and Taylor McCaffrey LLP has determined there is no conflict in us acting;
 - (ii) the other person has died; or
 - (iii) the other person was informed of the subsequent communication and has agreed to Taylor McCaffrey LLP acting on the new instructions; and
- (c) in the event the new retainer is accepted, Taylor McCaffrey LLP would be obliged to hold the subsequent communication in strict confidence and not disclose it to the other person.

Finally, Taylor McCaffrey LLP has advised that we may obtain independent legal advice in respect of this joint retainer and this acknowledgement and consent form, which we have either (i) obtained or (ii) declined to obtain given that we understand the nature and effect of jointly retaining Taylor McCaffrey LLP to act for both of us and signing this form.

Having been so advised, we are content that Taylor McCaffrey LLP act for both of us in these matters and hereby consent.

(print name of spouse or common-law partner)

(signature of spouse or common-law partner)

(date)

(print name of spouse or common-law partner)

(signature of spouse or common-law partner)

(date)

Notes:
