

DO YOU HAVE A WILL?

If you have purchased a new home...

If you have started a family...

If you want peace of mind...

YOU need a WILL!

What is a Will?

A Will (Last Will and Testament) is a legal document that details how your property will be distributed after your death.

A Will allows you to name your personal representative(s) who will represent your estate after your death and carry out the wishes you have stated in your Will. A Will also allows you to name a guardian for any children who are minors at the time of your death.

In addition to a Will, it is important to think about what you would want to happen if you were no longer able to make personal or financial decisions in the event you become seriously ill or injured. Whereas a Will comes into effect on your death, a Personal Directive and Enduring Power of Attorney can ensure your wishes are followed while you are still alive but unable to make decisions.

What is a Personal Directive?

A Personal Directive allows you to name a decision maker and/or provide written instructions to be followed when, due to illness or injury, you no longer have the capacity to make personal decisions such as where you will live or the medical treatment you will receive.

What is an Enduring Power of Attorney?

An Enduring Power of Attorney allows you to appoint someone to make financial and legal decisions on your behalf when, due to illness or injury, you no longer have the capacity to take care of things such as paying bills, dealing with buying or selling property, accessing your bank accounts, etc.

Are you prepared?

A properly prepared estate plan allows you to direct where your property will go after your death. This important step can save a great deal of time, expense and stress for your family and loved ones during a time of grief. It is a good idea to consult with a lawyer to discuss your estate plan to ensure you have the appropriate documents in place to protect you and your property.

If you are interested in Estate Planning, please feel free to contact us anytime at:

jim@oliverhouselaw.com or nadine@oliverhouselaw.com

Our fees Effective January 1, 2018

Basic Will Package which includes a Will, Personal Directive and Enduring Power of Attorney (Single): **\$600***

Basic Will Package which includes 2 Wills, 2 Personal Directives and 2 Enduring Powers of Attorney (Couple): **\$800***

**includes GST and disbursements (expenses)*

Note: complex Wills may be subject to a surcharge.

Our services for basic estate planning include:

- giving you the expert advice and assistance you need to plan your Will according to your wishes
- preparing and witnessing the signing your Will, Personal Directive and Power of Attorney
- any minor changes you may require after the signing your Will, Personal Directive and Power of Attorney are complimentary.

Thank you for your interest in preparing your Estate Documents with Oliver House Law Office. We would be more than pleased to assist you with your Estate Planning.

Here are some answers to frequently asked questions.

What is an Estate Planning Questionnaire?

The attached 12 page questionnaire is information that we need in order to prepare the documents for your Estate Planning Package. Simply complete this form the best you can and either drop off, mail, fax or scan and email this form back to us. We will then prepare draft documents for you to review and make any changes to before you meet with the lawyer. If you have any questions about the form or its contents, you can contact us anytime.

Why do we have our clients complete an information form before I see a lawyer?

By providing us with your information beforehand, we can have your Estate planning papers as close to completed as possible prior to you coming in to sign with the lawyer. We find this streamlines our process. We can address any concerns or make any changes prior to meeting with the lawyer and if you have any last minute changes, they can be made in the meeting with the lawyer before you sign off on any documents. If you have any questions or concerns at any time, you can contact Nadine or Jim.

How long does the process take?

Once we have your completed Estate Planning Questionnaire back from you, our goal is to have draft documents to you within 2 weeks. If you need documents on a rush basis, please let us know and we will do our very best to accommodate you. The actual signing of your Estate papers with the lawyer will take approximately 1 hour.

What forms of payment do you take?

We can accept cash, personal cheque, certified cheque or bank drafts at this time. We do not have the means for any forms of electronic payment. Payment is due upon signing of your Estate Documents.

Where do I keep my signed forms when I am finished at the lawyer's office?

We do not keep any of your original papers here at our office, You only sign ONE original Will. We recommend that you keep your Will and one copy each of your Personal Directive and Enduring Power of Attorney in a safety deposit box, fire safe or other safe location. Make sure your Executor(s) knows where your documents are located. You should also give a COPY of your will and an original of each Personal Directive and Enduring Power of Attorney to the person(s) you have chosen to be your Agent/Attorney.

ESTATE PLANNING QUESTIONNAIRE

James D. Campbell, Barrister & Solicitor
Oliver House Law Office

♦ 10145 - 115 Street NW ♦ Edmonton ♦ Alberta ♦ T5K 1T3

Phone 780.484.0665 ♦ Toll Free: 1-866-977-1358 ♦ Fax 780.486.7282

Email: james@oliverhouelaw.com Paralegal Email: nadine@oliverhouelaw.com

website: www.oliverhouelaw.com

PERSONAL INFORMATION

Your full legal name: _____

Your maiden name: _____

Date of Birth: _____

Place of Birth: _____

Home Address: _____

Phone Numbers: _____

Email Address: _____

Occupation: _____

Employer: _____

Employer's Address: _____

Citizenship: _____

SIN #: _____

Marital Status: _____

Date/Place of Marriage: _____

Previous Marriages: YES NO

If YES: Name of previous Spouse: _____

Date of Separation/Death/Divorce: _____

Do you have obligations such as child support, spousal support? YES NO

If you are not married, are you living with a common law partner? YES NO

If yes, with whom? _____

SPOUSE INFORMATION

Full legal name: _____

Maiden name: _____

Date of Birth: _____

Place of Birth: _____

Home Address: _____

Phone Numbers: _____

Email Address: _____

Occupation: _____

Employer: _____

Employer's Address: _____

Citizenship: _____

SIN #: _____

CHILDREN

Do you have any children: YES NO

If YES, please provide following information:

Full Legal Name	Date of Birth

Do your children live with you? YES NO

If NO, please explain: _____

Are any of the children adopted, step-children, or illegitimate? YES NO

If YES, please explain: _____

Are any of the grandchildren adopted, step-children, or illegitimate? YES NO

If YES, please explain: _____

Are you responsible for any other children? YES NO

If YES, please explain: _____

Are any of your children or grandchildren mentally or physically incapacitated?

YES NO

If YES, please explain: _____

Are you responsible for any dependent adults who are mentally or physically incapable of handling their own affairs? YES NO

If YES, please explain: _____

Have any of your children predeceased you? YES NO

If YES, please give the name, date of death and the names of their children (if any):

FINANCIAL INFORMATION

Principal (Home) Residence:

Municipal (Street) Address: _____

Legal Description: _____

Names of Owners on Title: _____

If more than one owner on the Title, is the title held JOINTLY (Joint Tenants) or TENANTS IN COMMON? (circle one)

What is the current market value of the home? _____

What is the current approximate balance of any mortgages of lines of credit registered as security on the home?

Lender/Bank Name: _____

Amount owing: _____

Lender/Bank Name: _____

Amount owing: _____

Are the mortgages life insured? YES NO

Additional property you own:

Municipal (Street) Address: _____

Legal Description: _____

Names of Owners on Title: _____

If more than one owner on the Title, is the title held JOINTLY (Joint Tenants) or TENANTS IN COMMON? (circle one)

What is the current market value of the home? _____

What is the current approximate balance of any mortgages of lines of credit registered as security on the home?

Lender/Bank Name: _____

Amount owing: _____

Lender/Bank Name: _____

Amount owing: _____

Are the mortgages life insured? YES NO

IF YOU HAVE SEVERAL PROPERTIES, YOU CAN ADD A SEPARATE PAGE WITH ALL THE DETAILS.

Bank Accounts:

Name of Bank: _____

Account Holder Names: _____

Name of Bank: _____

Account Holder Names: _____

Name of Bank: _____

Account Holder Names: _____

Name of Bank: _____

Account Holder Names: _____

Approximate Current Balance in All Accounts: _____

Debts Owed to You:

Does anybody owe money to you for things such as personal loans, promissory notes, mortgages, agreements for sale, etc? YES NO

If YES, please explain: _____

Other Assets:

Please list any other assets you may have, such as GICs, Term Deposits, Pension Plans, RRSPs, Annuities. Please be sure to provide details of where these assets are located or through, together with the current values and the named beneficiaries:

Are you in a partnership in a Corporation? YES NO

If YES, please explain: _____

Do you own shares in either a private or public Corporation? YES NO

If YES, please explain: _____

Valuable Personal Property:

Please list the items, their location, the cost to purchase and the current value for each item. Examples are art, silverware, jewelry, coins, vehicles, heirlooms, etc.

PLEASE ATTACH A SEPARATE PAGE IF NOT ENOUGH ROOM HERE TO LIST EVERYTHING.

Other assets:

- Do you have any interest in mines and minerals? YES NO
- Do you have any interest in assets outside of Alberta? YES NO
- Do you have any interest in assets outside of Canada? YES NO
- Do you have any interest in another Estate or Trust? YES NO
- Do you have any interest in Farm Land? YES NO
- Do you own any other property in joint tenancy? YES NO
- Do you have a life insurance policy on the life of someone else? YES NO
- Have you loaned money to family members or others that are to be collected or forgiven? YES NO

If YES to any of the above, please provide details: _____

Liabilities:

Please list the name of the creditor, the amounts owed and the due dates of any payments. These are things like mortgages, credit cards, personal loans, vehicle loans, monies owed to Revenue Canada, etc:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Are any of your debts life insured? YES NO

Do you have any credit cards which pay life insurance benefits? YES NO

PERSONAL ADVISORS

Please provide the name, address and phone number of each advisor:

Family Doctor: _____

Insurance Agent: _____
(home, auto)

Life Insurance Agent: _____

Financial Advisor: _____

Accountant: _____

Other: _____

Do you have a safety deposit box: YES NO

Where is it located? _____

Where are the keys? _____

Have you pre-arranged your funeral? YES NO

If YES, please provide details: _____

If NO, what specific instructions would you like to give regarding your funerary wishes?

Do you currently have a Will? YES NO

If YES, what is your reason for a new Will? _____

NOTE: You may send along any documentation that you feel may be pertinent to assist us, including your current Will, any Co-habitation Agreements, Separation Agreements, Divorce Judgements, Land Titles, etc.

EXECUTORS

Note: If your spouse is the sole beneficiary of your Estate, it may be preferable to name them as a primary Executor. Typically one primary and one alternate Executor will be sufficient, depending on your circumstances. For tax reasons, it is not advisable to choose an Executor who does not reside in Canada. At least one Executor should reside in Alberta, particularly when you have beneficiaries under the age of 18 years.

1. Full name: _____

Relationship to you: _____

Address: _____

Occupation: _____

Age: _____

Will this person be your primary Executor? YES NO

2. Full name: _____

Relationship to you: _____

Address: _____

Occupation: _____

Age: _____

Will this person be a joint primary Executor or Alternate Executor?

Joint Primary Alternate

3. Full name: _____

Relationship to you: _____

Address: _____

Occupation: _____

Age: _____

Will this person be a joint primary Executor or a joint or second Alternate Executor?

Joint Primary Joint Alternate Second Alternate

Have all of your Executors been asked and are willing to act? YES NO

GUARDIANS FOR MINOR CHILDREN

Even though you cannot "Will" a child to someone, this section is to provide your preference of whom you would like to care for them.

1. Full name: _____
 Relationship to you: _____
 Address: _____
 Occupation: _____
 Age: _____

2. Full name: _____
 Relationship to you: _____
 Address: _____
 Occupation: _____
 Age: _____

Have all of your Guardians been asked and are willing to act? YES NO

BENEFICIARIES

Leave all to your spouse? YES NO

If Spouse predeceases you, you would like to distribute your estate:

- Equally to all of my children
- Different percentages to all of my children
- Different percentages to particular children

At which age are your children to receive their share of your estate?

- All at 18 years old
- All at _____ years old
- _____% at 18 years old and then _____ % at _____ years old and the balance at _____ years old
- Other: _____

Do you want the Public Trustee to monitor trust for minor beneficiaries? YES NO

If one child predeceases you, or before attaining age at which they are entitled to their share, who shall receive that share or the amount remaining?:

- the children of the deceased child (my grandchildren)
 equally to my remaining surviving children
 Other: _____

If you, your spouse, your children and grandchildren are killed in a common accident, or any of your children or grandchildren survive you but pass away before becoming entitled to their portion of your Estate, how is your Estate to be divided?:

- 1/2 to my parents and 1/2 to my spouse's parents
 1/2 to my brothers and sisters and 1/2 to my spouse's brothers and sisters
 equally divided between my brothers and sisters
 to my and my spouse's nieces and nephews in equal shares
 Charities (provide details):

- Other (provide details): _____

Beneficiaries Other than Your Spouse or Children:

1. Full name: _____
 Relationship to you: _____
 Address: _____
 Age: _____
 What share of your estate would you like to leave for this person (*can be percentage or specific amount*): _____

2. Full name: _____
 Relationship to you: _____
 Address: _____
 Age: _____
 What share of your estate would you like to leave for this person (*can be percentage or specific amount*): _____

3. Full name: _____
Relationship to you: _____
Address: _____
Age: _____
What share of your estate would you like to leave for this person (*can be percentage or specific amount*): _____

4. Full name: _____
Relationship to you: _____
Address: _____
Age: _____
What share of your estate would you like to leave for this person (*can be percentage or specific amount*): _____

Specific Gifts or Legacies

Please list each item, its value and the person designated to receive that item. *Caution: Please only list items of monetary or of great sentimental value.*

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

Charitable Donations:

Please list the amount or item an organization is to receive

- 1. _____
- 2. _____
- 3. _____

End of Questionnaire