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ESTATE PLANNING INFORMATION

1. Your Planning Information

Mr. Mrs. Ms. Miss Other

Last Name

First Name

Middle Name

Birth Date

Occupation

Citizenship

Email

Home Tel:

Business Tel:

Mailing Address

Marital Status:

- Married Divorced Separated
 Common-law Single Widowed

2. How did you hear about us?

- Yellow Pages Neighbourhood Radio
 Television Ads Internet
 Referred by: _____

3. We Need To Know

- 1) Have you been married before? Yes No
- 2) Do you own your own home? Yes No
- 3) Do you own a business? Yes No

- 4) Do you own real estate other than your home? Yes No
- 5) Do you own assets outside of Ontario? Yes No
- 6) Do you have a marriage contract or separation agreement? Yes No
- 7) Have you been hospitalized or diagnosed with an illness? Yes No
- 8) Can you identify your assets with designated Beneficiaries (Life Insurance policies, R.R.S.P.'s, pensions, etc)? Yes No
- 9) Have you a child or beneficiary with special needs/in receipt of government benefits? Yes No
- 10) If not married, are you planning to be married in the next year? Yes No

Please identify any special concerns you wish to cover during our meeting?

4. Who's to be in charge? Estate Trustees, Executors and Guardians

My Executors and Guardians

1) My executor will be: _____

Relationship(s): _____

2) Back-Up Executor: _____ Relationship: _____

3) Guardian for minor children: _____

4) Back-Up Guardian: _____

5. My Beneficiaries

Names: Relationship to you: Age:

1. _____

2. _____

3. _____

4. _____

5. _____

6. Other _____

Are you excluding a child or spouse? Yes No

If "yes", please provide name(s):

POWERS OF ATTORNEY

What if you become incapacitated? Have you signed a document to designate an "attorney" (a substitute decision maker) who will make financial and health decisions for you if you no longer can?

6. Power of Attorney For Personal Care

My choice for Attorney(s) for Personal Care:

Relationship: _____

My alternate choice for Attorney(s) for Personal Care:

Relationship: _____

7. Power of Attorney For Property

My choice for Attorney(s) for Property:

Relationship: _____

My choice for Alternate Attorney(s) for Property:

Relationship: _____