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Re: Will Intake Information Form

Disclaimer

The content herein is not, nor is it intended to be, legal advice; it is for information purposes only. In order to receive legal advice from me, I must be retained by you. A consultation does not create a lawyer-client relationship or retainer. The content herein is not meant to be exhaustive. The content herein is intended to be a starting point. Some information herein may not apply in your particular situation. Additionally, some information may be missing that would be crucial in your particular situation.

Part 1: Instructions for Completing this Form

You can fill out as much or as little as you like. We will go over all of the information during our meeting(s). This form is simply meant to get you thinking about your estate plan and the questions we will be asking.

Each person requiring a Will should answer the questions by handwriting or typing the answers to each of the questions. Please be sure to note the corresponding Part and question number to each of the questions answered.

Part 2: Information Gathering

1. Is there any reason for urgency in the preparation of your Will?
2. Identification: at the initial consultation, we will require two pieces of identification. At least one piece must have a picture. Unfortunately, Ontario Health Cards are not an acceptable form of identification. This is not an office policy, the *Personal Health Information Protection Act, 2004* forbids it.

3. Marital Status:

- Single,
- Common Law,
- Engaged,
- Married,
- Separated,
- Divorced, or
- Widowed.

Is there any Cohabitation Agreement, Marriage Contract, Separation Agreement or Court Order?
If yes, please provide copies.

4. Do you have an existing Will? If yes, please provide copies.

5. Do you have an existing Power of Attorney for Property? If yes, please provide copies.

6. Do you have an existing Power of Attorney for Personal Care? If yes, please provide copies.

7. Have you ever had a capacity-related diagnosis?

8. Do you have any Children and/or Grandchildren? If yes, I will require the following information for each child or grandchild:

- Name,
- Date of Birth,
- Address,
- Marital Status,
- Parents.

9. Do you have any dependants that or not your children?

10. Assets:

- Bank Accounts,
- GICs,
- Stocks,
- Bonds,
- Debentures
- Mutual Funds,
- Investment Accounts,
- RRSPs,
- RRIFs.

11. Personal Property:

- Vehicles,
- Boats,
- Jewellery,
- Artworks,
- Valuable Collectables.

12. Real Property:

Address,
Registered Owners,
Mortgage,
Date acquired.

13. Business Interests:

Name,
Address,
Ownership Structure
Sole Proprietor,
Partnership, or
Corporation. (Is there are a shareholder agreement)

14. Liabilities

- Creditor Information

Part 3: Executors/Trustees

Who do you want to appoint to be the executor/trustee of your estate? If you want to appoint more than one Executor/Trustee, do you want the executors/trustees to work together (Jointly) or independently (Jointly and Severally)?

It is good planning to appoint an alternate executor/trustee in the event the first named executor(s)/trustee(s) become unwilling or unable to carry out the duties of administering your estate. We strongly recommend having alternate executor(s)/trustee(s)

We will require the following information for each named executor/trustee:

- Name,
- Address, and
- Relationship to you.

Part 4: Beneficiaries

The Beneficiaries are the people and/or charities you want to receive gifts from your estate.

In the case of individuals, is there a specific age at which you would like a beneficiary to receive their gift?

The two major categories in this section are the Specific Gifts and the Residue.

Specific Gifts: These are the specific gifts of property or sums of money. For example, you would like to leave your red convertible car to your son John, and \$50,000.00 to your daughter Jane.

Residue: The residue of your Estate is everything that remains after payment of all debts, fees, taxes and specific gifts. The residue is generally distributed as a percentage. For example, if you have two children, you could give each child a 50% share of the residue of your Estate.

It's important to think about what you want in the event that a beneficiary passes away before you. Should the gift go to the deceased beneficiary's children or grandchildren. In the alternative, should the gift be split among the other beneficiaries already named? A further alternative is that some other person or charity would receive a gift if a first named beneficiary dies prior to you – these beneficiaries would be the Alternate Beneficiaries.

We will require the following information for each named beneficiary in your Will:

- Name,
- Address, and
- Relationship to you.

Part 5: Minor Children

Who would you want to have custody and/or guardianship of your children should you pass away prior to them reaching the age of majority? Such appointments are for a maximum of 90 days and a permanent Order is made pursuant to a Court.