

# INFORMATION SHEET FOR LEGAL MATTERS

To expedite your visit with your lawyer or personal advisor, complete this form and provide it to the lawyer or advisor in advance of your appointment.

## PERSONAL INFORMATION

1. LAST NAME: \_\_\_\_\_ FIRST NAME: \_\_\_\_\_ MIDDLE NAME: \_\_\_\_\_
2. ADDRESS UNIT # \_\_\_\_\_ HOUSE NUMBER \_\_\_\_\_ STREET NAME \_\_\_\_\_  
CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_  
PHONE: \_\_\_\_\_ HOME \_\_\_\_\_ CELL \_\_\_\_\_
3. DATE OF BIRTH \_\_\_\_\_ PLACE OF BIRTH: CITY \_\_\_\_\_  
PROVINCE/COUNTY/STATE \_\_\_\_\_ COUNTRY \_\_\_\_\_
4. MARITAL STATUS: Married \_\_\_\_\_ Single \_\_\_\_\_ Widow/er \_\_\_\_\_ Common-law \_\_\_\_\_  
Other \_\_\_\_\_
5. FULL LEGAL NAME OF SPOUSE/PARTNER  
LAST NAME: \_\_\_\_\_ FIRST NAME: \_\_\_\_\_ MIDDLE NAME: \_\_\_\_\_  
UNIT # \_\_\_\_\_ HOUSE NUMBER \_\_\_\_\_ STREET NAME \_\_\_\_\_  
CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_  
PHONE: \_\_\_\_\_ HOME \_\_\_\_\_ CELL \_\_\_\_\_
6. NAMES, ADDRESSES AND AGES OF CHILDREN:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
7. DO YOU OR YOUR SPOUSE HAVE CHILDREN FROM A PREVIOUS RELATIONSHIP – IF SO, PROVIDE NAMES, ADDRESSES AND AGES  
\_\_\_\_\_  
\_\_\_\_\_
8. CURRENT STATE OF ILLNESS OR DEATH PLANS:  
  
DO YOU HAVE A:  
a) WILL \_\_\_\_\_ DATE: \_\_\_\_\_  
b) POWER OF ATTORNEY \_\_\_\_\_ DATE: \_\_\_\_\_  
c) REPRESENTATION AGREEMENT \_\_\_\_\_ DATE: \_\_\_\_\_  
d) ADVANCE DIRECTIVE \_\_\_\_\_ DATE: \_\_\_\_\_  
e) DNR \_\_\_\_\_ DATE: \_\_\_\_\_
9. APPROXIMATE VALUE OF ASSETS NET OF DEBT: \_\_\_\_\_

10. DO YOU HAVE AN ACCOUNTANT? Y/N  
NAME AND CONTACT INFORMATION \_\_\_\_\_

11. DO YOU HAVE A FINANCIAL ADVISOR? Y/N  
NAME AND CONTACT INFORMATION \_\_\_\_\_  
\_\_\_\_\_

12. DO YOU HAVE SOMEONE IN MIND AS YOUR EXECUTOR? YOU CAN HAVE MORE THAN ONE EXECUTOR. PROBABLY NO MORE THAN TWO UNLESS THERE ARE EXTENUATING CIRCUMSTANCES.

a) SPOUSE \_\_\_\_\_

b) ADULT CHILD \_\_\_\_\_

c) SIBLING \_\_\_\_\_

d) CLOSE FRIEND \_\_\_\_\_

WHO WOULD THE ALTERNATE BE IF YOUR FIRST CHOICE IS UNABLE OR UNWILLING TO ACT AS YOUR EXECUTOR? \_\_\_\_\_

13. IF YOUR CHILDREN ARE UNDER THE AGE OF 19 – WHO WOULD YOU WANT TO HAVE AS THE GUARDIAN OF YOUR CHILDREN? \_\_\_\_\_

If your spouse is the parent of your children, they would carry on as the guardian. If you have children with an ex-spouse, then they would likely carry on as the guardian of your children.

IF BOTH YOU AND YOUR SPOUSE WERE TO DIE, WHO WOULD YOU WANT AS THE GUARDIAN(S) OF YOUR CHILDREN? \_\_\_\_\_

14. DO YOU HAVE SOMEONE IN MIND AS YOUR ATTORNEY IN YOUR POWER OF ATTORNEY? YOUR ATTORNEY DOES NOT HAVE TO BE THE SAME PERSON AS YOUR EXECUTOR.

PROBABLY YOUR SPOUSE. Y/N ALTERNATE PARTIES. \_\_\_\_\_

15. DO YOU HAVE SOMEONE IN MIND AS YOUR REPRESENTATIVE FOR YOUR REPRESENTATION AGREEMENT?

PROBABLY YOUR SPOUSE? Y/N

ALTERNATES \_\_\_\_\_

AGAIN, THIS CAN BE SOMEONE DIFFERENT THAN YOUR EXECUTOR OR ATTORNEY.

16. DISTRIBUTION OF ESTATE.

ITEM 16 – Typically, a person leaves everything to their spouse. If you have children from a previous relationship this might not be the case. If your spouse were to predecease you then generally a person leaves everything to their children in equal shares. There may be reasons why this would not be the case however. You will have to discuss the timing of when your children receive their gift. You can pick different amounts and at different ages. Your advisor will work through these questions with you.

17. DO YOU HAVE ANY SPECIFIC GIFTS THAT YOU WANT TO MAKE?

AGAIN, YOU CAN DISCUSS THIS WITH YOUR ADVISOR. THERE MAY BE A PARTICULAR ITEM OR DOLLAR AMOUNT THAT YOU WANT TO LEAVE SOMEONE OR SOME ORGANIZATION.

18. DO YOU HAVE ANY INSTRUCTIONS AS TO FUNERAL / BURIAL / CREMATION?

19. EMERGENCY CONTACT:

LAST NAME: \_\_\_\_\_ FIRST NAME: \_\_\_\_\_ MIDDLE NAME: \_\_\_\_\_

UNIT # \_\_\_\_\_ HOUSE NUMBER \_\_\_\_\_ STREET NAME \_\_\_\_\_

CITY \_\_\_\_\_ PROVINCE \_\_\_\_\_ POSTAL CODE \_\_\_\_\_

PHONE: \_\_\_\_\_ HOME \_\_\_\_\_ CELL \_\_\_\_\_

**HELPFUL INFORMATION:**

**ITEMS 1- 11** - You should not have any issues filling out Items 1 to 11. This information should be fairly straightforward. This will give your advisor the basic information they require to open a file and have the basic background information about you and your family.

**FOR ITEMS 12 TO 17** – You do not need to fill these out fully. If you understand the roles of an Executor, Guardian, Attorney and Representative then you just need to give them some consideration before you meet with your advisor. Usually your spouse will be the first person for all of these roles. If you don't have a spouse or in the event they predecease you then you have to consider some options. It might be that they are not the same person for each role. Someone might be perfect to be your alternate Executor but not necessarily your Alternate Guardian. Your advisor will go through these items with you and make some suggestions.

**ITEM 18** – You can discuss this with your advisor as well. This is not as important as it was years ago. Most people are cremated nowadays which makes things a bit simpler. This is a very personal decision though and you might want to specify some certain instructions.

December 16, 2023