

THINGS TO THINK ABOUT BEFORE WRITING YOUR WILL

1 EXECUTOR/ESTATE TRUSTEE/ADMINISTRATOR

THIS IS THE PERSON, OR PERSONS WHO WILL BE RESPONSIBLE FOR ADMINISTERING YOUR ESTATE AND THE DISTRIBUTION OF YOUR ASSETS. YOU SHOULD PICK SOMEONE WHO IS CLOSE TO YOU AND TRUSTED. IF YOU CHOOSE MORE THAN ONE PERSON TO ACT JOINTLY, YOU SHOULD ENSURE THESE PEOPLE CAN WORK TOGETHER AMICABLY AFTER YOU ARE GONE.

ANOTHER ALTERNATIVE IS TO HIRE A PROFESSIONAL COMPANY, THIS MAY INCREASE COST BUT FOR PARTICULAR CIRCUMSTANCES IS ADVISABLE.

2 SUBSTITUTE OR BACK UP EXECUTOR/ESTATE TRUSTEE/ADMINISTRATOR

ALWAYS CHOOSE A BACK UP JUST IN CASE YOUR FIRST CHOICE IS UNABLE OR UNWILLING TO ACT.

3 BENEFICIARIES

WHO WOULD YOU LIKE TO INHERIT YOUR POSSESSIONS?

4 SUBSTITUTE OR BACK UP BENEFICIARIES

CHOOSE SUBSTITUTE OR BACK UP BENEFICIARIES JUST IN CASE

5 SPECIFIC BEQUESTS

MAKE A LIST OF ANY SPECIFIC INSTRUCTIONS OR GIFTS/BEQUESTS TO BENEFICIARIES

6 MINORS AND DEPENDENTS

MINORS AND DEPENDENTS NEED TO BE PROVIDED FOR, BOTH FINANCIALLY AND TERMS OF GUARDIANSHIP. CHOOSE WHO WILL BE RESPONSIBLE FOR THEIR CARE

- 7 ARE THERE BENEFICIARIES WITH DISABILITIES?
- 8 FUNERAL INSTRUCTIONS
- 9 ORGAN DONATION
- 10 DEBT FORGIVENESS
- 11 CONSIDER ANY INSURANCE POLICIES WITH NAMED BENEFICIARIES, ANY PROPERTY OWNED AS JOINT-TENANTS, JOINT ACCOUNTS AND NAMED-BENEFICIARY DESIGNATIONS ON RRSP/RIF ACCOUNTS OR TFSA ACCOUNTS. THESE ASSETS WILL LIKELY FALL OUTSIDE THE SCOPE OF THE WILL.

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LAW PARTNERS^{LLP}





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**GET IN TOUCH WITH US
TODAY, WE WOULD LOVE
TO HELP PLAN YOUR
LEGACY**

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