

WILLS & ESTATE PLANNING

A properly prepared Will is the cornerstone of an Estate Planning Package which commonly also includes an Enduring Power of Attorney, Living Will and, sometimes, a Representation Agreement.

Last Will and Testament – wherein you:

- appoint an executor to administer your property when you pass away, someone to pay your debts and distribute your property in accordance with your wishes
- appoint a guardian for your children under the age of 19 years (if both parents pass away)

Enduring Power of Attorney – wherein you appoint a person to manage:

- all or some of your legal and financial affairs, major transactions such as selling or mortgaging real estate and minor day-to-day bill payments etc. **with or without restrictions**

Section 7 Representation Agreement – wherein you appoint a person to help make day-to-day decisions re:

- health care matters - medications, tests, dental care, minor or major surgery, end-of-life care
- personal care matters - living arrangements, safety, diet, dress, exercise, activities
- legal affairs - obtaining & instructing legal counsel, commencing or settling a claim
- day-to-day finances: paying monthly expenses, banking, dealing with Canada Revenue and managing finances

Section 9 Representation Agreement – a Section 7 but with more detailed directions regarding your health and personal care:

- can authorize refusal of resuscitation, life support or specified medical treatment options
- can authorize less common medical procedures (electroconvulsive ‘shock’ therapy (ECT), abortion, experimental treatments, psychosurgery, participation in a health care or medical research program not approved in BC, or negative stimuli therapy to produce a change in behavior)

Living Will – wherein you declare your intentions to health care providers:

- with respect to end-of-life decision, a precondition to admission to a hospice or palliative care ward, an alternative to a signed Do Not Resuscitate (DNR) form

Estimated Fees

The fees below are minimum charges based on the legal time expended to complete the specified tasks charged at \$300 per hour. For example, Simple Wills for a couple take about 1 ½ hours, if it takes more, we reserve the right to charge for any extra time expended. Seniors and couples enjoy the discounts below.

Legal Fees for Documents Below*	One Document	Pair of Documents
Simple Will	\$300.00	\$450.00
Power of Attorney	\$200.00	\$300.00
Living Will (when purchased with Will)	\$65.00	\$100.00
All Three Documents Above	\$565.00	\$850.00
<i>All Three Documents Above for Seniors (65 and up)</i>	<i>\$500.00</i>	<i>\$750.00</i>
Representation Agreement	\$300.00	\$450.00

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* wills registration, disability or spendthrift trusts, life estates, taxes and disbursements not included.

WILLS QUESTIONNAIRE (FOR SINGLES OR COUPLES)

Your Full Legal Name: _____

Your Status: never married married common law separated divorced widowed

Your Place of Birth: _____ Your Date of Birth: _____

Spouse's Full Legal Name: _____

Spouse's Place of Birth _____ Spouse's Date of Birth: _____

Your Address: _____

_____ Postal Code: _____ Tel: _____

Your Occupation: _____ Spouse's Occupation: _____

Any Children? No Yes, as follows (attach list if necessary):

Child #1 Name: _____ ours his hers - age/occupation: _____

Child #2 Name: _____ ours his hers - age/occupation: _____

Child #3 Name: _____ ours his hers - age/occupation: _____

Child #4 Name: _____ ours his hers - age/occupation: _____

The first Executor of my(our) Will(s) shall be first my spouse then the Alternate Executors below:

1st Alternate Executor's Name: _____ Relation: _____

1st Executor's Address: _____

2nd Alternate Executor's Name: _____ Relation: _____

2nd Executor's Address: _____

Guardian's Name: _____ Relation: _____

Guardian's Address: _____

Which of the following matches your wishes?:

Leave everything to my spouse if alive, if not, to my children equally

Leave everything to my children: equally or in differing percentages

Leave everything to _____

I wish to be: cremated buried in accordance with my prepaid arrangements at _____

Have you signed a cohabitation, marriage, or separation agreement? yes no

I am contemplating getting: married divorced in the future.

I will keep my will at home in a fire proof box (better) in a safety deposit box at the following bank or credit union: _____.

I would like to discuss having a: Power of Attorney Living Will Representation Agreement

Transfer of my Home into a Joint Tenancy

Solicitor's Remarks:

estate:

capacity:

issues: