

CINDY MCGOLDRICK PROFESSIONAL CORPORATION

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INSTRUCTIONS FOR WILL & POWERS OF ATTORNEY

Date: _____ Complete Name: _____

Complete Address: _____

Home Phone: _____ Work: _____

Cell: _____

Date of Birth: _____ Occupation: _____

Full Name of Spouse: _____

Is this your first marriage? YES or NO Do you currently have a Will? YES or NO

EXECUTOR

The Executor is the person(s) responsible for carrying out your wishes as expressed in your Will. The job can be both difficult and time consuming. The person you choose should be someone who has the time, has some familiarity with your financial situation and who will get along with your family. Most married couples name each other as their Executor, although you do not have to do this. It is also a good idea to choose an alternate Executor in case your original choice is not able to do the job.

Name and Address of Executor: _____

Name and Address of Alternate Executor: _____

GUARDIANS

If your children are under the age of 18, you should choose someone to look after them. Although the Court is not bound by your choice of Guardian, it will generally respect your wishes. Many people will choose the same person to be the Guardian as the alternate Executor. Others feel this is too much power in the same hands.

Name and address of Guardian: _____

List names and ages of your children: _____

WHO SHOULD GET WHAT AND WHEN

Do you have any particular items (e.g. jewelry, cars, tools...) that should go to specific people? If yes, please describe them and indicate the name of the recipient.

Do you want to leave money to anybody? If yes, please indicate the amount and the name of the recipient(s).

Who should get the residue of your Estate? The residue is the bulk of your Estate and consists of everything that you did not give away above.

If something happens to both you and your spouse, who should get the residue of your Estate? Usually this would be your children. If your children are under the age of 18, until what age should their money be held in Trust? Even though the money is in Trust it is available for their care and education, however a responsible adult controls it.

At what age should your children get control of their money? _____

If your children are under the age of 18, and none of you survived, who should get the residue of your Estate?

If one of your adult children predeceases you, should their share of the Estate go to their children (i.e. your Grandchildren) or should their share go back into the pot for your surviving children?

To Grandchildren? _____ Back in the Pot? _____

Do you have a Pet(s)? If yes who should look after it? _____

Do you have RRSP's YES or NO Who is the Beneficiary? _____

Do you have Mortgage Insurance? YES or NO

Do you have life Insurance? YES or NO Amount: _____

Who is the Beneficiary? _____

POWERS OF ATTORNEY

Powers of Attorney are documents that allow you to appoint someone to act on your behalf when you are still alive, but unable to make decisions and/or act for yourself. This can both include financial and health matters. You may also give instructions that you are not to be kept alive on life support if there is no hope of you recovering from what has happened to you.

Power of Attorney – Property: _____

Alternate Power of Attorney – Property: _____

Power of Attorney – Health: _____

Alternate Power of Attorney – Health: _____

Living Will: YES or NO
