

Instructions for Your Will

Lewis Langevin LLP

Please complete as much of this form as possible. The information provided will be incorporated into your will.

Name: _____ Date: _____

Do you already have a will?

Yes _____ No _____

If Yes, what year was it done? _____

If Yes, where is it? _____

Have you pre-arranged your funeral? Yes _____ No _____

If you have pre-arranged your funeral, what is the name and address of the funeral home?

If you have **not** pre-arranged your funeral, do you have any special instructions that you want in your will?

No _____ Yes _____ If Yes, details _____

Do you wish to donate any of your organs to be used for organ transplants?

Yes _____ No _____ Not right now _____ Not sure _____

Other comments _____

A. Estate Trustees

(Your Estate Trustee is the person who gathers in your assets, pays your bills and distributes your money and other assets to your beneficiaries in accordance with your will. This person can be your spouse, some or all of your children (provided they are at least 18 years old), a trust branch of a financial institution or someone else in whom you have confidence. You can have more than one Estate Trustee.

A.1 Who do you want to be your Estate Trustee?

Your spouse alone Yes _____ No _____

Your spouse **together** with the following named

Yes _____ No _____

Only the following named: Yes _____ No _____

Name(s), address, e-mail address and telephone number for each. Please also specify relationship to you. Note: You do not need to name more than one estate trustee.

- 1. _____

- 2. _____

A.2 Who do you want to be the alternate Estate Trustee(s) in the event that something happens to the person(s) you have just named above to be your Estate Trustee (such as that person dies, has a stroke, or just does not want the responsibility)?

Name(s), address, e-mail address and telephone number for each. Please also specify relationship to you. Note: You do not need to name more than one alternate estate trustee.

- 1. _____

- 2. _____

B. Beneficiaries:

When you die, how do you want your estate distributed?

B.1 IF YOU HAVE A SPOUSE, complete this Section:
(if you do not have a spouse, please skip this section and go to **B.2**)

B.1.a) Even while your spouse is still alive, are there any particular assets, such as a piece of jewellery or an item of special furniture, to go to someone **other than your spouse**?

No _____ Yes _____

If Yes, are you going to prepare a list to be kept somewhere?

Yes _____ No _____

If Yes, where will it be?

with your original will _____

in your safety deposit box _____

in special place at home _____

If No, do you want the items and the persons listed in your will?

Yes _____ No _____

If Yes, name of person(s) and particular asset(s):

(B.1.b) Even while your spouse is still alive, are there any charities to which you want to leave money?

Yes _____ No _____ Not right now _____

If Yes, name of each charity and amount to be given:

1. _____

2. _____

3. _____

4. _____

(if more than 4 charities, please list the names and amounts on a separate piece of paper)

B.1.c) Does everything else in your estate go to your spouse upon your death?

Yes _____ No _____

If No, details _____

B.1.d) For the part of your estate which goes to your Spouse are there any restrictions?

No _____ Yes _____

If Yes, details _____

B.2 IF YOU DO NOT HAVE A SPOUSE, or in the event that your SPOUSE DIES BEFORE YOU, complete this Section:

B.2.a) Are there any particular assets, such as a piece of jewellery or an item of special furniture, to go to someone?

If Yes, are you going to prepare a list to be kept somewhere

Yes _____ No _____

If Yes, where will it be?

with your original will _____

in your safety deposit box _____

in special place at home _____

If No, do you want the items and the persons listed in your will?

Yes ___ No ___

If Yes, name of person(s) and particular asset(s):

B.2.b) Are there any charities to which you want to leave money?

Yes _____ No _____ Not right now _____

If Yes, name of each charity and amount to be given:

1. _____
2. _____
3. _____
4. _____

B.2.c) If you do not have a spouse, or in the event that you spouse dies before you do, what is to happen to the balance of your estate?

B.4 This section is to be completed only if you have a **beneficiary** who is **under 18 years** of age **or** you have a beneficiary **over 18 but** you want that person to have to **wait until a later age** to receive the money from your estate:

B.4.a) What age do you want the beneficiary to be before that person receives the money from your estate "without any strings attached"?

18 ___ 21 ___ 25 ___ 30 ___ other _____

B.4.b) Do you want your Estate Trustee to be able to pay out some of the capital from the under-age beneficiary's share to or for the benefit of that beneficiary if the money is needed for such things as dental bills, medical care or education?

Yes _____ No _____

B.4.c) If the underage beneficiary survives you, but dies **before** reaching the age you specify that the person can have the money "without any strings attached," what do you want to have done with the balance of that person's share?

B.5 This section to be completed only by those with children Under 18:

Who is to be the **Guardian** of any children you have who are under 18 years of age at your death?

Name and Address of Guardian(s) (include relationship to you):

B.6 This section to be completed by everyone:

Are any of your beneficiaries challenged physically or mentally or receiving any type of government financial assistance, for a disability or otherwise?

No ___ Yes ___

If Yes, details _____

This is NOT A WILL. These are INSTRUCTIONS ONLY. When you have completed as much of this form as you can, please e-mail this form (or send by surface mail) to your lawyer at Lewis Langevin LLP, or take it to your first interview with your lawyer.

What you have printed in these Instructions will NOT become part of your Will until it has been prepared by your lawyer AND you have signed your Will.

Your lawyer will review these instructions and include in your Will the appropriate powers to be given to your Estate Trustee(s).

Signature of person completing this form