



PREPARING FOR YOUR ESTATE PLANNING APPOINTMENT

1. COMPLETE THE PERSONAL INFORMATION CHECKLIST

Please complete and return to us (preferably in advance of your appointment, if possible) the personal information checklist that was sent to you when you booked your appointment. This information will be the basis for your discussion with your lawyer about your Will and other estate and incapacity planning documents.

2. PROVIDE COPIES OF RELEVANT DOCUMENTS / AGREEMENTS

Where applicable, we recommend providing copies of the following documents for our review:

- Marriage agreement (prenup or cohabitation agreement)
- Separation Agreement or Divorce Order from a prior relationship
- Current Will, Enduring Power of Attorney, or Representation Agreement
- Shareholders Agreement, Partnership Agreement, or any other business agreement restricting the transfer of your business interest

3. PLANNING YOUR WILL

- **CONSIDER WHO YOU WANT TO ACT AS YOUR EXECUTOR / TRUSTEE.** This is the person who carries out the instructions in your Will and administers any trusts established in your Will. You should consider an alternate Executor in case your first appointed Executor is unable to act. A co-executor appointment could also be considered (e.g., two or more persons acting together):

We will need the full legal names and addresses of the Executor(s)/alternate(s) and their relationship(s) to you.

- **CONSIDER WHO YOU WANT TO BENEFIT FROM YOUR ESTATE.** (e.g.: spouse, children, stepchildren, relatives, friends, charitable organizations):

For individual beneficiaries we will need their full legal names and addresses, and relationship(s) to you.

- **CONSIDER WHO YOU WANT TO APPOINT AS GUARDIANS OF YOUR MINOR (UNDER 19) CHILDREN.** Also, consider an alternate guardian.

We will need the full legal name(s) and address(es) of your guardians, and their relationship(s) to you.

4. PLANNING FOR INCAPACITY

- Do you require an Enduring Power of Attorney (to appoint somebody to make legal and financial decisions on your behalf)?

- **CONSIDER WHO YOU WANT TO ACT AS YOUR LAWFUL ATTORNEY.** This is the person who carries out any instructions you may provide or, if you are incapable, makes legal and financial decisions for you. You should consider an alternate Attorney in case your first appointed Attorney is unable to act. A co-attorney appointment could also be considered (e.g., two or more persons acting together):

We will need the full legal names and addresses of the Attorney(s)/alternate(s).

- Do you require a Representation Agreement (to appoint somebody to make personal and health care decisions on your behalf)?

- **CONSIDER WHO YOU WANT TO ACT AS YOUR REPRESENTATIVE.** This is the person who makes health and personal care decisions for you if you are incapable of doing so yourself. You should consider an alternate Representative in case your first appointed Representative is unable to act. A co-representative appointment could also be considered (e.g., two or more persons acting together):

We will need the full legal names and addresses of the Representative(s)/alternate(s).



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LAWYERS



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Sheri is a partner with RDM Lawyers LLP and focuses her practice on business law, real estate and advising her corporate clients on estate planning matters.



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Kam is an associate with RDM Lawyers LLP and advises on wills, trusts, estates and corporate matters. He is a registered trust and estate practitioner (TEP) and a certified executor advisor (CEA).



Marta Dean
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Marta is an associate with RDM Lawyers LLP. She has been practicing law since 2010 and focuses primarily on advising clients on estate planning (wills, trusts, powers of attorney, etc.) and estate administration.



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Jeevan is an associate with RDM Lawyers LLP and advises clients on estate planning and estate administration matters, while also practicing in the areas of real estate and business law.



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Stephanie is an associate with RDM Lawyers LLP and advises clients on estate planning and estate administration. She also practices in the areas of business law and real estate.

ASSISTANTS

Our dedicated staff assist with the preparation of Wills, Enduring Powers of Attorney, Representation Agreements, and Trusts, and assist executors and administrators with estate administration matters including the preparation of applications for Grants of Probate and Grants of Administration. Our paralegal, Carol Reid, brings over 35 years of experience to the team.



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At RDM Lawyers LLP, we have the experience to assist you with your wills, trust, and estate planning needs, from the simple to the complex. We also have the skill, empathy, and professionalism necessary to navigate you through the complicated issues that may arise when administering an estate.