

Will and Estate Planning Attendance Memo

Lawyer: John Benesh **Today's Date:** _____, 20____

Price: \$ _____ **Deadline:** _____, 20____

Testator Name: _____ **Testator's Birthdate:** _____

Testator's E-Mail: _____

Testator's Address: _____

Testator's Phone: (Cell) _____ (Home) _____ (Bus.) _____

Also Appoint _____

... **To be my** Power of Attorney Health Care Directive **If more than one:** Jointly /

Severally

Executor: _____ **Relation to Me:** _____

Joint / Several Executor: _____ **Relation to Me:** _____

Alternative Executor 1: _____ **Relation to Me:** _____

Alternative Executor 2: _____ **Relation to Me:** _____

Specific Bequeathments: _____

Residue of Estate Goes To: _____

Estate Is Distributed:

Per Stirpes (i.e., to the above beneficiaries equally, with the shares that would have gone to any pre-deceased divided up to that person's children and/or children's children, *ad infinitum*).

Not *Per Stirpes*. Below, write where the share that would have gone to a beneficiary named above will go if that beneficiary dies.

Guardian for any Children under 18: _____ Relation: _____

Age Under Which Executor Holds Beneficiary's Share in Trust: _____

RRSP Beneficiary: _____ Relation to Me: _____

Insurance Beneficiary: _____ Relation to Me: _____

Will Made in Contemplation of: Co-habitation w/ _____ Impending Marriage w/ _____

Separation/divorce from _____ Interspousal contract w/ _____

Remember, if testator is in care of someone, interview and sign separate from caregiver and keep detailed notes!

Any life insurance? Yes / No If yes, who are beneficiaries? _____

If yes, who are the contingent beneficiaries? _____

Any real estate? Yes / No If yes, describe it: _____

If yes, who else is on title, and are those people joint owners, tenants in common, trustees, etc.?

Is this will made in contemplation of: Co-habitation Impending marriage
Separation/divorce

Interspousal contract Trust Contract of sale

If yes, details: _____

Any interests in any corporations or businesses? Yes / No If yes, details: _____

Do you have an accountant? Yes / No If yes, who? _____

Any arrangements for tax planning, charities, or a spousal trust? Yes / No

If yes, details: _____

Who are your family members? (i.e., spouse, children, grandchildren, parents, siblings, adopted, etc.)

Who do you want to benefit? _____

Do you want a trust? Yes / No If yes, details: _____

Any beneficiaries with intellectual / physical disabilities? Yes / No If yes, details: _____

General nature of current estate: _____

Potential nature of estate: _____

Any property outside SK? Yes / No If yes, describe: _____

Any potential / contingent / guarantees or claims for you, your business, or a beneficiary?

Yes / No

If yes, describe: _____