

Distribution of Rest and Residue: *if applicable beyond standard*

FULL NAME	RELATIONSHIP	PERCENTAGE	ADULT / INFANT

Per Stirpes *Per Capita*

Special Instructions:

Trustee Powers:

Investing	Yes	No	Employ Agents	Yes	No
Selling & Disposing	Yes	No	Lease/Manage Real Property	Yes	No
Retaining	Yes	No	Settle Claims	Yes	No
Distribution <i>in specie</i>	Yes	No	<i>Income Tax Act</i> elections	Yes	No

Include clause intention only to benefit beneficiary and not spouse: Yes No

POWER OF ATTORNEY

Attorney: _____ **Relationship:** _____
Alternate 1: _____ **Relationship:** _____
Alternate 2: _____ **Relationship:** _____

If more than one attorney appointed, acting how? Jointly Severally Jointly & Severally

HEALTH CARE DIRECTIVE

Proxy: _____ **Relationship:** _____
Alternate 1: _____ **Relationship:** _____
Alternate 2: _____ **Relationship:** _____

If more than one proxy appointed, acting how? Jointly Severally Jointly & Severally

Quote: \$ _____ **Deadline:** _____

	Single	Spousal
Will	\$400	\$600
POA	\$200	\$300
HCD	\$100	\$150
Will, POA & HCD*	\$550	\$825

Full price for will, then ½ price for additional docs

1. IN ORDER to carry out the trusts of my Will, I give my Trustee the following powers to be used in the exercise of an absolute discretion at any time:
 - a. *Investments*
 - i. My Trustee may invest the monies of my estate, from time to time, in any kind of property, as my Trustee in her absolute discretion considers advisable. My Trustee **shall OR shall not** be limited to investments in which trustees are by statute authorized to invest trust funds.
 - ii. My Trustee may engage any person or company my Trustee considers appropriate as investment counsel, broker, or agent. My Trustee may rely upon the advice of and delegate to such counsel, broker, or agent the management of part or all of my estate as my Trustee deems advisable from time to time on a discretionary account basis. My Trustee in the exercise of an absolute discretion shall pay to such counsel, broker, or agent any fees or charges so incurred out of my estate, charged to income or to capital or both as my Trustee may determine. Any such fees or charges shall not be applied to reduce the compensation awarded to my Trustee.
 - iii. When making investments, my Trustee **shall OR shall not** be subject to the criteria in planning for, or the requirements for diversifying the investment of the trust property, which are prescribed by the law for trustees, but may make and retain such investments as my Trustee may consider appropriate from time to time.
 - b. *Selling and disposing* — My Trustee may realize or dispose of the assets of my estate, subject to the trusts of my Will, in any manner and on any terms.
 - c. *Retention of assets* — My Trustee may hold any of my assets in the form in which they may be at the time of my death for any length of time, whether or not they are assets in which trustees would otherwise be entitled to invest trust monies. Those assets so retained shall be deemed to be authorized investments.
 - d. *Distribution in specie* — My Trustee may make any division, distribution or allocation of the assets of my estate in kind and at such valuations as my Trustee in the exercise of an absolute discretion considers appropriate. In determining such valuations, my Trustee may consider such future expectations for such assets as my Trustee in the exercise of an absolute discretion considers appropriate, including any tax liability or credit. Any decision of my Trustee in this regard shall be binding on all beneficiaries of my estate.
 - e. *Employment of agents* — If my Trustee considers it necessary to engage any corporation or person to carry out some or all of the directions in my Will, my Trustee may employ such corporation or person and may pay compensation out of my estate, all as my Trustee considers appropriate.
 - f. *Real property* — If any real or leasehold property forms part of my estate, my Trustee may lease such property for any term and subject to such conditions as my Trustee considers appropriate. My Trustee may accept surrenders of leases and tenancies, may pay money out of the income or capital of my estate for repairs and improvements, and may generally manage the property. My Trustee may give any options that my Trustee may consider advisable. My Trustee may renew any mortgage, may borrow money on any real estate upon any mortgage, and may pay off any mortgage which may exist at my death or at any renewal.
 - g. *Settlement of claims* — Without the consent of any person interested under my Will, my Trustee may compromise, settle or waive any claim at any time due to or by my estate and may make any agreement with any person, government or corporation which shall be binding upon all persons interested in my estate.
 - h. *Elections* — My Trustee may any time make or choose not to make any election, or designation, or may do, or choose not to do, any other act or exercise any discretion or authority referred to in the *Income Tax Act*, which my Trustee shall consider in the best interests of my estate and my beneficiaries or any of them.