

The Law Offices of
THOMAS H. MARSHALL, Q.C.
Professional Corporation
BARRISTERS & SOLICITORS

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Wills and Powers of Attorney Information Form

Leave any part blank that does not apply or ask questions if you are unsure

Part I. Your Personal and Family Information

Client 1	Client 2
Full Name (<i>mention "also known as" names</i>)	
Address	
Contact Information	
Home: _____ Work: _____ Cell: _____ Email: _____	Home: _____ Work: _____ Cell: _____ Email: _____
Date and Place of Birth	
Citizenship	
<input type="checkbox"/> Canadian Citizen <input type="checkbox"/> Other: _____ <input type="checkbox"/> Canadian Resident <input type="checkbox"/> Other: _____	<input type="checkbox"/> Canadian Citizen <input type="checkbox"/> Other: _____ <input type="checkbox"/> Canadian Resident <input type="checkbox"/> Other: _____
Marital Status	
<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Common-Law <input type="checkbox"/> Separated <input type="checkbox"/> Single <input type="checkbox"/> Widowed <input type="checkbox"/> Will being made in contemplation of marriage to _____ on _____	<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Common-Law <input type="checkbox"/> Separated <input type="checkbox"/> Single <input type="checkbox"/> Widowed

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Client 1		Client 2	
Date and Place of Marriage			
Previous Marital History			
Domestic Contracts <i>(include particulars and status of Separation Agreement, etc.; provide copy)</i>			
Existing Wills and Powers of Attorney <i>(specify solicitor who acted)</i>			
		<input type="checkbox"/> Same	
Children			
Name	Date of Birth	Address	
If any are not the natural children of Client 1 and Client 2, provide details.			
Support Obligations			

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Client 1		Client 2	
Other Dependants			
Promises You Have Made Regarding Your Estate			
Other Beneficiaries to be Named <i>(including charities, friends, etc.)</i>			
Name & Relationship		Date of Birth, if a minor	Address
Special Concerns <i>(special needs, staged distribution, etc.)</i>			
Other Provisions to be included in your Will			
		<input type="checkbox"/> Same	

Part II. Will Instructions

Client 1	Client 2
Executor(s) <i>(include address, if not resident of Canada)</i>	
<p>If more than one concurrently, are they to act:</p> <p><input type="checkbox"/> Jointly (must act together); or</p> <p><input type="checkbox"/> Jointly and Severally (together or independent)</p>	<p><input type="checkbox"/> Same</p> <p>If more than one concurrently, are they to act:</p> <p><input type="checkbox"/> Jointly (must act together); or</p> <p><input type="checkbox"/> Jointly and Severally (together or independent)</p>
Alternative Executor(s)	
Specific Gifts <i>(Household Goods, Personal Effects, Jewellery, Automobiles, etc.)</i>	
<p><input type="checkbox"/> Conditional on spouse having predeceased Gift: _____ Beneficiary: _____</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Gift: _____ Beneficiary: _____</p>	<p><input type="checkbox"/> Same</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Gift: _____ Beneficiary: _____</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Gift: _____ Beneficiary: _____</p>
Cash Legacies <i>(including charities)</i>	
<p><input type="checkbox"/> Conditional on spouse having predeceased Amount: _____ Beneficiary: _____</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Amount: _____ Beneficiary: _____</p>	<p><input type="checkbox"/> Same</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Amount: _____ Beneficiary: _____</p> <p><input type="checkbox"/> Conditional on spouse having predeceased Amount: _____ Beneficiary: _____</p>

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Client 1	Client 2
Disposition of Residence and/or Cottage	
	<input type="checkbox"/> Same
Create Trusts for Beneficiaries?	
Disposition of Residue	
If you are leaving the residue to your children, specify whether it should be divided equally among your surviving children (<i>per capita</i>) or whether the share of a predeceased child should be divided among his or her children (<i>per stirpes</i>).	
	<input type="checkbox"/> Same
Guardian for Children	
Additional provisions, if any, re expenses, education, retaining house, etc.:	
Funeral, Burial and Other Special Instructions	
	<input type="checkbox"/> Same
Other Special Powers or Clauses	
	<input type="checkbox"/> Same
