



**TESTATOR**

Full Name .....  
Residential Address .....  
Occupation .....

**SPOUSE**

Full name .....  
Occupation .....

**EXECUTOR/S**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**AND (if more than one)**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**ALTERNATIVE EXECUTOR/S**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**AND (if more than one)**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**FUNERAL ARRANGEMENTS**

Does the testator have any specific desires: cremation/burial.

**GUARDIAN/S**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**AND (if more than one)**

Full name .....  
Relationship to Testator .....  
If unrelated – Address .....  
Occupation .....

**SPECIFIC GIFTS** (only substantial or special items should be gifted specifically)

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**DISPOSITION OF ESTATE**

To spouse if surviving testator for 30 days;

If no surviving spouse, to testator's children equally. If all possible children have not attained desired age of entitlement, state age at which each child shall take their respective share - ..... years,

BUT if any children die leaving children, then those children take the deceased child's share equally upon attaining 18 years of age.

**AND** (if appropriate)

If no children or grandchildren survive the parents [circle required option(s)]:-

(a) half to the testator's brothers/sisters and/or parents and/or nephews/nieces equally, and

(b) half to the brothers/sisters and/or parents and/or nephews/nieces equally of the testator's spouse equally.

**Or** Gift to charity (specify name of charity)

**STANDARD PROVISIONS** will be included in the Will to provide for flexibility in administration should the estate continue for some time due to infant beneficiaries. These cover the following points:-

1. The Executor is given wide powers of investment and may maintain any investments held by the deceased.
2. The Executor may make advancements to meet the education or maintenance of any infant beneficiary until that beneficiary is entitled to its share.
3. As a customary protection to Executors from litigious beneficiaries, the Executor is not liable for any negligence.

**MIRROR WILL FOR SPOUSE** YES / NO If required, the Will for the testator's spouse will be prepared containing similar terms. Are there any additional terms?

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**NOTES**

1. The above instructions are suggested provisions for normal circumstances. Are there special circumstances? e.g. Do either spouse have children from previous relationships?  
Are testamentary trusts required?  
Are there any beneficiaries under a disability (drug dependency, spendthrift, disabled?)
2. Does the testator have the capacity to make a Will eg soundness of mind, memory and understanding?
3. If the testator has a family trust, is he aware that the assets held by the trust are not his to dispose of by Will?
4. If the testator is the guardian and appointor of a trust has he adequately provided for a successor to these offices? Does the Trust Deed allow for his successor to be nominated by Will?
5. If all the property is not passing to the spouse, is the family home owned jointly, as tenants in common or by one spouse?
6. Any land bequeathed passes subject to any encumbrances unless otherwise provided.
7. Is a special execution clause required because the testator is illiterate, visually impaired or unable to read or understand the English language?

**ENDURING POWER OF ATTORNEY** YES / NO

Full Name of Donee .....

Address .....

**AND** (if two) ..... JOINTLY / JOINTLY AND SEVERALLY

Full name .....

Address .....

Attorney to be in force [ ] immediately and notwithstanding subsequent legal incapacity, or  
[ ] only during any period when a declaration of legal incapacity is made.

**NOTE:** A Power of Attorney must be registered at the Land Titles Office if it is to be used in the case of a land transaction although it may be registered at the time of the transaction.

Registration required now? YES / NO