



WILL PREPARATION WORKBOOK

Heritage Law Offices

Introduction

The making of a Will is something that we all prefer to put off to a future date. Law reports are full of cases in which expensive litigation and undesired results could have been avoided by a properly drafted Will, but individuals just kept putting it off. A Will is an unselfish courtesy to your dependents and loved ones.

This workbook provides an outline of the information required to draw up a Will. There are blanks left so that the information may be filled in under the explanation paragraph for each section. If you wish to have a Will prepared, please return this workbook with the requested information. We will then prepare a Will in draft form and contact you to review and prepare the final form for your signature.

You may wish to make an appointment to discuss further your questions and obtain advice for your particular situation.

Your Information

Your Personal Information	
Your Full Legal Name (no initials):	
Other/Preferred Name(s):	
Date of Birth:	Place of Birth:
Mailing Address (including City, Province, & Postal Code):	
Phone Number(s):	
Marital Status:	
Common Law: Yes: No: I'm not sure:	



Personal Representative

The Personal Representatives for your estate are persons appointed to make decisions and handle the affairs of your estate. Where both husband and wife are making a Will, typically each would want to appoint the other as Personal Representative.

It may be preferable that your Personal Representative or Personal Representatives be resident in the province in which you live, but this is not an absolute requirement. Your Personal Representative(s) should have some knowledge of your affairs and should be advised of the existence and location of your original Will.

You may appoint two persons to act jointly as Personal Representatives if you wish.

Personal Representative Information	
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:

It is wise to appoint a person or persons to act as an **Alternate** to the first named Personal Representative(s), in the event that your first named Personal Representative(s) dies before you, or is unwilling or unable to act.

Alternative Personal Representative Information	
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:



Arrangements in the Will

Use this section of the Workbook to outline the specific clauses, bequests, and arrangements that you would like to have incorporated in your will. Circumstances that you should consider are outlined in subsequent sections.

Arrangements

General Arrangements		
Cremation Clause:		Burial Clause:
Organ Donation: Yes: No:	Trustee Compensation:	
Other Arrangement(s):		

Bequests

A list of your assets is not required for the preparation of a Will. You may, however, wish to give specific items from your Estate to a particular person. For instance, there are items of value which a person may wish to hand down to certain individuals. If such items are to be included, please list them below, describe each item in as much detail as possible and indicate the name and city of residence of the person who will receive them, and their relationship to you.

You may wish to give a specified amount of money to one or more persons, in which case the amount and the name of the beneficiary should be listed in the space below.

If you are married, for each of the special bequests please indicate whether the bequest would go to the beneficiary before or after the death of your spouse.

Please be advised that specific bequests may be listed in your **handwritten memorandum**, rather than your Will, which will give you flexibility as a memorandum may be modified by you at any time without witnesses being present. If you wish to list your specific bequests in a memorandum, please advise us of your intentions.



Bequests continued

Special Bequests	
Memorandum Clause:	Yes: No:
1.	
2.	
3.	
4.	

Residue

The residue of your Estate is made up of all other property not referred to in the previous paragraph as being given to a particular person. It is most common that the entire residue is given to the surviving spouse. If it is your intention that the residue of the estate should go to your spouse, please place his/her full name in the space below. If the residue of the Estate is to be divided among persons in addition to or other than your spouse, please place their names, addresses and the proportion or percentage of the share in the space provided below.

Residue of Estate		
Full Legal Name:	Relationship to you:	% of Estate:
Address (including City, Province, & Postal Code):		
Full Legal Name:	Relationship to you:	% of Estate:
Address (including City, Province, & Postal Code):		
Full Legal Name:	Relationship to you:	% of Estate:
Address (including City, Province, & Postal Code):		



Residue continued

It is also necessary to provide for the situation where your spouse has died before you. It is most common that the residue would be divided equally among your surviving children. If this is not your wish, you may then name one or more persons who would receive the residue of the Estate. Please fill in the information in the space provided.

Residue of Estate	
TO CHILDREN: Yes: No:	
(If children are over the age of 18 years, list their names and addresses below)	
Full Legal Name:	
Age:	
Address (including City, Province, & Postal Code):	
Full Legal Name:	
Age:	
Address (including City, Province, & Postal Code):	
Full Legal Name:	
Age:	
Address (including City, Province, & Postal Code):	
TO NAMED PARTY: Yes: No:	
Full Legal Name:	
Relationship to you:	Age:
Address (including City, Province, & Postal Code):	
Full Legal Name:	
Relationship to you:	Age:
Address (including City, Province, & Postal Code):	

Trusts for Children

If you have children under the age of eighteen (18) years, or other beneficiaries of the age of minority, or have named as beneficiaries persons under the age of majority you



may wish to provide for them by giving your Personal Representative or Trustee a discretion to encroach upon the capital of the Estate for the upkeep and maintenance of the children or other beneficiaries. There are several choices as to the details of how this will be handled. The legal age in Alberta is eighteen (18) years, but you may specify that your children or other beneficiaries will not receive the balance of their share of the Estate until whatever age you specify over eighteen years.

Trusts continued.

You may specify that each child or beneficiaries will obtain their respective share of the Estate as they attain the age of eighteen years or postpone the distribution until the youngest attains the age of eighteen years (or any other age which you have specified). If there is a wide age spread between your oldest and youngest child, it may be wise to postpone the distribution until the youngest attains the age of eighteen years so that there will be sufficient interest from the capital of the estate to provide for living expenses for each child during their minority.

Trust Clauses			
Post-Secondary Clause: Yes: No: Other:			
Applies to: Children only: Grandchildren only:			
Notes/Other:			
Age Clause: Yes: No:		Applies to: Children only: Grandchildren only:	
As each reaches age of majority (18):		When youngest reached age of majority (18):	Other (specify below):
Full Legal Name:	Age to receive Share of Estate:		
Full Legal Name:	Age to receive Share of Estate:		
Full Legal Name:	Age to receive Share of Estate:		



Notes (if any):

Predeceased Children

The next choice you have to cover the possibility that at the time your children become eligible for the residue of your estate, one of those children is not living. You may provide that the share that would have gone to the deceased child will be divided amongst your surviving children, or you may provide that the share may be handed down to any grandchildren (children of the deceased child). Please specify your choice of those alternatives below.

Alternatives in the Event of a Predeceased Child

1. Divide share amongst your surviving child(ren)? Yes: No:
Please Select Only If deceased has no children:

Notes (if any):

2. Divide share amongst the children of the deceased? Yes: No:

Notes (if any):

Guardians

Guardians are those persons who are appointed to look after the day-to-day needs of your children during their age of minority. They will be called upon to take custody of the children, be responsible for the day-to-day upbringing of your children in the event of the death of both parents while the child is still under the age of eighteen years. Guardians may be the same person or persons as your Personal Representatives. It is advisable to request permission of the person named as Guardian to act in that capacity if required. You may wish to appoint a single individual or a married or common law



couple as Guardian(s). However, please be aware that complications may arise if you appoint a couple as Guardian and they later separate.

Guardian(s)	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	

Guardians continued

You may also wish to appoint alternate Guardian(s) in the event that the first named Guardian(s) are unable or unwilling to act.

Alternative Guardian(s)	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	

Family Demise

If both you and your spouse, together with your children should die in a common incident, you should specify who you wish to receive your estate, whether it be your parents or other named beneficiaries.

Beneficiaries	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	



Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Full Legal Name:	Relationship to you:
Address (including City, Province, & Postal Code):	
Notes (if any):	

A Note on RRSPs and Life Insurance Policies

Please be advised that unlike all other assets you may own at the time of your death, your RRSP's and proceeds of any life insurance policy do not automatically become part of your estate but are handled separately. If you have designated a beneficiary on these assets, they will in most cases be given to the named beneficiary regardless of what the Will states. It is highly recommended that you check with your issuing institution to confirm that the named beneficiaries (if applicable) still reflect your wishes.

PLEASE NOTE

This Workbook cannot be used as a Will but simply contains your instructions for the preparation of a formal Will.

The information outlined in this letter is designed to provide for a Will which is simple and yet flexible enough so that changes will not be required under most circumstances. If you have special problems or specific questions or feel that a more complex Will is required in your situation, please make an appointment to meet with our lawyer to advise you further.



Next Steps

We hope that this workbook has provided an overview and explanation to you of the information required and of the matters to be dealt with in a Will.

If you have any questions about the points raised in this letter, please feel free to telephone our office at 780.436.0011.

We look forward to hearing from you and receiving your instructions.

NOTES: [Please feel free to keep track of any questions or concerns you may have here]



Enduring Power of Attorney

The *Powers of Attorney Act of Alberta* has provided an opportunity to deal in advance with the possibility that a person may become mentally incompetent to handle their own affairs.

An ordinary Power of Attorney is still available whereby a person empowers another to handle their financial affairs. A Power of Attorney terminates if the person who gave the Power of Attorney becomes mentally incompetent. Then the only method available to look after that person's affairs is by way of appointment of a Trustee and Guardian under the Dependent Adult Act of Alberta. This is a slow, expensive, and cumbersome process.

The law now provides for an “**Enduring Power of Attorney**”. This means that you can appoint a person or persons to act for you at such a time as you may become mentally incapable of handling your own financial affairs. For example, a husband and wife may appoint each other as Attorneys to act in the event that either one becomes mentally incapable. They may also designate alternate Powers of Attorney in the same way as they may appoint each other as Personal Representatives with further alternatives under a Will.

If you wish to have an Enduring Power of Attorney drafted, kindly provide the following:

Power of Attorney

An Attorney under an Enduring Power of Attorney is a person authorized to act on your behalf with respect to your property and financial affairs

Attorney Information	
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Age: Or Approximate Age:	
Relationship to you:	
To be effective:	Immediately: <u>OR</u> Upon Mental Incapacity:

You may wish to appoint a person to act as an alternate to the named Attorney in the event your first name attorney dies before you.



Alternate Attorney(s) Information	
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:

Restrictions

Are there any restrictions you wish to impose on your Powers of Attorney?

Restrictions	
Property to be used for your benefit only:	Best possible Level of Care:
Other Restriction(s):	



Personal Directive (Living Will)

A Personal Directive (commonly referred to as a living will) was, until December 1, 1997, not recognized in Alberta. This is now possible under the *Personal Directives Act of Alberta*.

You may now prepare a Personal Directive appointing an agent to act on your behalf should you become mentally incompetent to make decisions about the following subjects:

- Your medical care
- where you will live
- your social activities
- educational pursuits
- employment
- legal and personal matters

A Personal Directive is your opportunity to deal in advance with the possibility of becoming mentally incompetent to deal with your own decisions relating to the subjects as outlined above.

The Personal Directive appoints an Agent, usually a family member, to act on your behalf and carry out the instructions that you set out in the document. Your instructions may be general in nature or be specific as to what medical treatment you might wish to withhold if your condition is terminal.

Alberta law has provided for some time an “Enduring Power of Attorney”. This document is available to appoint a person to handle financial matters if you lose mental capacity. However, does not include the power to deal with personal and health care decisions that are now provided for with a Personal Directive.

If you wish to have a Personal Directive drafted, kindly provide the following:

Agent

An Agent under a Personal Directive is a person authorized to act on your behalf with respect to your personal and health care decisions.

Agent Information
Full Legal Name:
Address (including City, Province, & Postal Code):
Relationship to you:



You may wish to appoint a person to act as an alternate to the named Agent in the event your first name attorney is unable or unwilling to act.

Alternate Agent(s) Information	
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:
Full Legal Name:	
Address (including City, Province, & Postal Code):	
Relationship to you:	Jointly and Severely:

Direction

Directions	
Would you want your life to be prolonged by artificial means when you are in a coma, or a persistent vegetative state and, in the opinion of your physician and other consultants, have no known hope of regaining awareness and higher mental functions, no matter what is done?	
Yes: No:	
Do you wish to be kept comfortable and free from pain, meaning that you may be given pain medication even though it may dull consciousness and indirectly shorten your life?	
Yes: No:	
Notes (if any):	



Heritage Law Offices Service Listing

Will, Enduring Power of Attorney, & Personal Directive Price List	
Single Enduring Power of Attorney <u>or</u> Single Personal Directive	\$300 + GST = \$315.00
Single Will	\$375 + GST = \$393.75
Single Enduring Power of Attorney <u>and</u> Single Personal Directive	\$425 + GST = \$446.25
Single Will <u>and</u> Single Enduring Power of Attorney <u>or</u> Single Will <u>and</u> Single Personal Directive	\$525 + GST = \$551.25
<u>Single Will Package: (3 Documents)</u> Single Will, Enduring Power of Attorney, <u>and</u> Personal Directive	\$550 + GST = \$577.50
<u>Single Trust Will Package: (3 Documents)</u> Single Trust Will, Enduring Power of Attorney, <u>and</u> Personal Directive	\$850 + GST = \$892.50
Couple Enduring Power of Attorneys <u>or</u> Couple Personal Directives	\$450 + GST = \$472.50
Couple Mirror Wills	\$550 + GST = \$577.50
Couple Enduring Power of Attorneys <u>and</u> Couple Personal Directives	\$700 + GST = \$735.00
Couple Wills <u>and</u> Couple Enduring Power of Attorneys <u>or</u> Couple Wills <u>and</u> Couple Personal Directives	\$750 + GST = \$787.50
<u>Couple Will Package: (6 Documents)</u> Couple Wills, Enduring Power of Attorneys, <u>and</u> Personal Directives	\$900 + GST = \$945.00
<u>Couple Trust Will Package: (6 Documents)</u> Couple Trust Wills, Enduring Power of Attorneys, <u>and</u> Personal Directives	\$1400 + GST = \$1470.00

Appointment Booking

If you wish to complete these documents in one appointment, kindly fill out the workbook to the best of your ability and submit the form through our Adobe Webform. Once we received the required information back, we will reach out to you to book you in to review the drafted documents that our lawyer will prepare and answer any questions or concerns that you may have before signing the legal documents.

Alternatively, if you wish to **schedule an initial consultation**, kindly contact our Reception at 780.436.0011 or email us at reception@heritagelaw.com to book an appointment.

Thank you and we look forward to assisting you further