



Wills, Powers of Attorney and Estate Planning Package for a Couple

For \$750.00 plus HST, we will:

- Meet with you to obtain relevant social and financial information;
- Assess that information and provide appropriate estate planning advice;
- Provide “self-help” estate planning tips;
- Explain the nature and effect of a Power of Attorney for Property;
- Explain the nature and effect of a Power of Attorney for Personal Care;
- Discuss issues that need to be considered in deciding on the content of your Wills and Powers of Attorney;
- Identify any issues particular to you which suggest that more sophisticated Wills or Powers of Attorney would be appropriate;
- Explain the nature and cost of more sophisticated Wills or Powers of Attorney, if appropriate;
- Discuss the nature of Living Wills or Medical Directives and how they relate to Powers of Attorney for Personal Care;
- Take instructions on the content of your Wills and Powers of Attorney;
- Draft Wills and Powers of Attorney based on your instructions;
- Have the draft documents reviewed by another lawyer within our firm (peer review);
- Adjust your draft documents based on comments arising out of peer review;
- Meet to review your Wills and Powers of Attorney;
- Provide a sample Living Will or Medical Directive and discuss this document with you;
- Provide a sample format for a Holograph Codicil to be used for the disposition of personal items and discuss this document with you;

- Answer your questions regarding your Wills and Powers of Attorney;
- Adjust these documents based on your feedback and instructions;
- Instruct you on the execution of your Wills and Powers of Attorney;
- Witness your signature on these documents;
- Prepare, sign and have sworn an Affidavit of Execution for your Wills and attach it to the original of your Wills;
- Provide you with copies of your Wills and Powers of Attorney;
- Instruct you on the proper storage and care of your copies;
- Provide general guidance on when you should review your Wills and Powers of Attorney; and
- Generally advise you and answer your questions regarding your Wills, Powers of Attorney, and related documents.

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Frequently Asked Questions

Will we meet with a lawyer or a paralegal or secretary?

You will meet with a lawyer.

How many times will we have to come into your office?

As a general rule, we will meet with you twice: once to obtain your required information and instructions, and once to review, adjust, and sign your Will(s) and Powers of Attorney.

Will both myself and my spouse/partner have to meet with you for both interviews?

We prefer to meet with both of you on both occasions. However, in unusual circumstances, we can meet with one of you for the initial interview. For the signing interview, we must meet with both of you.

Can we provide instructions by telephone?

While we prefer to meet with you in person, we can take the initial instructions by phone. You must attend at our offices to sign the final documents. If this is impossible, we can meet with you elsewhere.

How long will this process take?

In most cases, it takes seven to 14 days from the date of the first meeting with a lawyer to complete and see you to sign your Will(s) and Powers of Attorney.

When would I need a more sophisticated Will(s) or Powers of Attorney?

Unusual social or financial circumstances may require documentation that is out of the ordinary. For example, if one of your principal beneficiaries is incapable of managing his or her affairs, you may require a special trust for that person. If your estate is unusually large, this may open the door to the use of trusts or dual wills to save probate or income taxes.

What are the extra costs involved with more sophisticated documents?

When meeting with you, we will discuss your needs and advise you on any additional costs beyond our standard package fees. You can then make an informed decision on whether or not you want to proceed with more sophisticated documents.

If I have an existing Will and/or Powers of Attorney, should I bring them with me?

Yes, if you can readily locate them.

How should I prepare for the first interview?

You don't have to prepare extensively for our first interview. You will already know most of the required information. Any missing information or documentation can be provided afterwards.

Can you come to my home to take instructions and sign documents?

We can come to your home for either or both of the interviews needed to complete this process. However, this will result in additional fees since more lawyer time and more staff time will be required. We would be pleased to discuss the additional costs with you.

This article is provided for information purposes only. It is not intended as, nor should it be taken as, legal advice. Contact us if you require legal advice on this or any other topic.