

Part A - Tell us about You

1. Name

	Title Mr., Ms. ...	Family Name	Given Name(s)
Full Legal Name			
Common Name	<input type="checkbox"/> Same <input type="checkbox"/> →		
Also known as any other Name	<input type="checkbox"/> None <input type="checkbox"/> →		
	<input type="checkbox"/> None <input type="checkbox"/> →		

2. Occupation

Title or Profession:	Additional Details	Company:

3. Date of Birth **3A. Country of Birth** **4. Gender** **5. List Countries in which you own Property or have Assets**

--	--	--	--

6. Canadian Resident?	6A. List other countries of residency	6B. Canadian Citizen?	6C. List other citizenships

7. Phone Numbers

Home	Business
Cell	Fax

8. Email Addresses

Primary	<input type="checkbox"/> Use for file specific <input type="checkbox"/> Use for general purpose
Alternate	<input type="checkbox"/> Use for file specific <input type="checkbox"/> Use for general purpose

9. Mailing Address

Building Number and Street Name	Apt/Unit/Suite/RR#	City	Prov / State	Postal Code	Country

Part B - Tell us about Your Spouse

1. Current Spousal Status

Are you currently living in a spousal relationship?	<input type="checkbox"/> Yes, Enter Below <input type="checkbox"/> No
Your current spouse's name?	
Are you married to him/her or common-law?	
Do you have a marriage contract or cohabitation agreement with him/her?	
Are we also to prepare wills and/or powers of attorney for him/her? If so, we also need a copy of this form from him/her too.	
Is he/she mentally or physically disabled?	
What is his/her date of birth?	

Please continue to Part C on next page.

You can further prepare for Your Meeting - Review the FAQ [Preparing to have a Will and/or Power of Attorney drafted](http://www.mmslawyers.com/pages/resources) found at www.mmslawyers.com/pages/resources.

Part C - Tell us about any Prior Spousal Relationships

1. Past Spousal Relationships (including deceased spouses)

Have you ever ceased living in a spousal relationship (death, divorce, separation, etc.)? Yes, Enter Below No

Do you have any spousal/child support or other family law obligations?

2A. First [former] Spouse

First [former] spouse's name? Status of that Relationship

Is there a separation agreement or court order affecting your obligations?

2B. Second [former] Spouse

First [former] spouse's name? Status of that Relationship

Is there a separation agreement or court order affecting your obligations?

2C. Third [former] Spouse

First [former] spouse's name? Status of that Relationship

Is there a separation agreement or court order affecting your obligations?

Part D - Funeral Wishes

Have you made funeral arrangements? Prearranged Prepaid Funeral Home:

Do you have burial rights? Cemetery Name:

If you have not prearranged, you can provide any wishes here:

Please continue to Part E on next page.

Part E - Tell us about the Other People in Your Life

1. Children, Grandchildren and Other Important People

-Provide details for ALL of your Children and Grandchildren (both living and deceased)

-Provide details for all of your Dependents (other than any spouse identified in Part A)

-Provide details for any other friends/family/associates who may be included in your will or power of attorney whether as a beneficiary, estate trustee or substitute decision maker

		Relationship	Gender	Date of Birth	Spousal Status	Status	Parent
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				
Name							
Address	<input type="checkbox"/> Same as me	<input type="checkbox"/> Same as parent	<input type="checkbox"/>				

Part F - Give us the Basics about your Property and Obligations

1. Real Estate - use section 6 if more space needed.				<input type="checkbox"/> I do not own any real estate <input type="checkbox"/> Enter Below	
Address or Description	Ownership	Other Owner(s)	Approximate Value		
2. Private Corporations/Business Interests - use section 6 if more space needed.				<input type="checkbox"/> I do not have any such interests <input type="checkbox"/> Enter Below	
Business/Corporation Name:	Positions held, if any	Approximate Value of Shares	Approximate Value of Other Interests		
3. Registered Investment Accounts - use section 6 if more space needed.				<input type="checkbox"/> I do not have any registered accounts <input type="checkbox"/> Enter Below	
Institution Name	Account Type	Designated Beneficiary	Approximate Value		
	RRSP				
	RRIF				
	TFSA				
	RESP				
	Pension Plan (RPP)				
	Other: <input style="width: 50px;" type="text"/>				
	Other: <input style="width: 50px;" type="text"/>				
4. Other Bank/Invest Accounts - use section 6 if more space needed.				<input type="checkbox"/> I do not have any other accounts <input type="checkbox"/> Enter Below	
Institution Name	Account Type	Joint Account Holder(s)	Approximate Value		
5. Life Insurance - use section 6 if more space needed.				<input type="checkbox"/> I do not have any life insurance <input type="checkbox"/> Enter Below	
Institution/Employer Name	Type of Insurance	Designated Beneficiary	Approximate Death Benefit		
6. Other Assets of Significant Value or Importance					
Description and Details				Approximate Value, if any	
7. Mortgage Debts, Liabilities and other Obligations				<input type="checkbox"/> I do not have any mortgages debts, liabilities or other obligations <input type="checkbox"/> Enter Below	
Description				Approximate Debt or Obligation	

Part G - Other Information

Date	Did anyone assist you in preparing this form?	<input type="checkbox"/> Name: <input style="width: 50px;" type="text"/>
------	---	--

Instructions:

The by-laws, rules and regulations of our regulatory body, the Law Society of Upper Canada, require that we obtain certain personal information from you. Even if you are a returning client, we need this information to ensure that the information that we have about you is up-to-date. Please see our privacy policy at www.mmslawyers.com/Privacy-Policy.shtml

Part A should be completed in full.

The remaining Parts should be completed the best that you can. Leave any sections in these Parts blank if you do not know or do not want to answer.

Part A – Tell us about You

1. Names

Title: If you leave this blank, we will assume Mr. for men and Ms. for women.

Legal Name: Your current name as it is recognized by the government.

Common Name: The name that you would prefer that we call you. For example, you may prefer that we refer to you by a middle name or a nickname or a married name that is not your legal name.

Also known as: If you own property, accounts, etc. in a name that differs from your legal name (including variants or a married or maiden name), provide details.

2. Your Occupation

If you have more than one occupation, please use the occupation with which you most identify.

If you are retired, please include the word retired in the Additional Details box and indicate the occupation from which you are retired.

3. Date and Place of Birth

Please provide details as they appear on your birth certificate.

4. Gender

Please specify.

5. Jurisdictions

List the provinces, states, countries in which you own real property or where any of your assets are held.

6. Residency and Citizenship

Please provide details of all countries that you are resident under the tax rules for those countries and all countries of which you are a citizen?

7. Phone Numbers

Sometimes we have a short timeline to contact you to obtain instructions. Please provide all numbers that we can use to contact you.

Use the tick box to indicate the number that you prefer that we use.

8. Email Addresses

Please provide all email addresses that you use. Also indicate whether we can correspond with you using that address.

Use for file specific: We can correspond with you to these email addresses regarding your legal matters.

Use for general purpose: We can correspond with you to these email addresses for matters that do not relate solely to your legal matters.

Note, if you send us an email, unless you provide instructions to the contrary in that email, you authorize us to reply, forward and copy emails to that email address regarding your legal matters.

9. Current Mailing Address

Provide us with your mailing address.

Part B – Tell us about your Spousal Status

1. Current Spousal Status

Your spousal status has a material impact on your Will and Powers of Attorney. If you are living in a spousal relationship (married or common-law), provide details. If you are married but separated, put that information in Part C. If you have had a spouse who has died, put that information in Part C.

If you have a marriage or cohabitation agreement with your spouse, please provide us with a copy.

Part C – Tell us about any Prior Spousal Relationships

2. Past Spousal Relationships

Provide details regarding any former spousal relationship. Include information regardless of the reason: separation, divorce, death.

If there are any outstanding obligations (support, property, etc.), please provide us with a copy of the separation agreement or court order.

Part D – Funeral Wishes

Funeral wishes are not binding on your estate trustee(s). Even if you prearrange and/or prepay for your funeral, your estate trustee(s) have the final say. We do not normally include funeral wishes in a Will. However, this information can be provided to your estate trustee(s). Even though you may provide us with this information, you should speak directly with your estate trustees regarding your funeral wishes.

Part E – People in Your Life

Please provide us with details of the important people in your life:

- Include your children and grandchildren who are living.
- Include your children and grandchildren who have already passed away.
- Include your children and grandchildren even if you do not want them to inherit from you.
- Include other persons who you intend to name in your will or powers of attorney.
- If you wish, you can also include contact information for your accountant, financial advisor(s), etc.

Full Name: Please provide what you believe to be the person's full legal name.

Relationship: How is the person related to you? Or how would you introduce the person? "This person is my ..."

Gender: Provide the person's gender.

Date of Birth: Provide the person's date of birth, if known?

Spousal Status: What is the person's spousal status, if known?

Status: Specify if the person disabled, deceased, a minor, or dependent upon you.

Parent: If the parent is named in Part A or Part B, you can use the parent's first name.

- If the person is your child, identify his/her other parent.
- If the person is your step-child, identify your spouse or former spouse who is his or her parent.
- If the person is your grandchild, identify which of your children is his/her parent.
- If the person is another relation, only give this information if important.

Address: Provide the person's address, if known.

Part F - Basics about your Property and Obligations

Please provide information concerning your estate. If there is not enough room for a particular item, you can also use section 6.

When providing values:

- Exact amounts are not required.
- You can round to the thousands or tens of thousands of dollars.
- You can provide a range of values.

Part G - Other Information

Please provide the date that you completed this form.

If someone has assisted you in preparing the form, please provide that information