

INSTRUCTION GUIDE FOR YOUR WILL

| GENERAL INI | FORMATION: |
|---|--|
| NAME: | DATE OF BIRTH: |
| CITIZENSHIP: | PLACE OF BIRTH: |
| ADDRESS: (including postal code) | |
| TELEPHONE: | (HOME) () (WORK) () |
| OCCUPATION: | EMPLOYER: |
| DO YOU NOW | HAVE A WILL? Yes No |
| | IF YES, WHAT YEAR WAS IT DONE? |
| | IF YES, WHERE IS IT? |
| REASONS FOR | NEW WILL |
| FSTATE TRUE | STEE (formerly known as "Executors"): |
| ESTATE TRUS | STEE (INTIMETTY KNOWN AS EXECUTORS). |
| beneficiaries in acco old), a trust compan alternate Estate Trus be your Estate Trus | e is the person who gathers in your assets, pays your bills and distributes your money and other assets to your ordance with your will. This person can be your spouse, some or all of your children (provided they are at least 18 years by, or someone else in whom you have confidence. You can have more than one Estate Trustee and/or you can have ustees. Alternate Estate Trustees are often named in the event that something happens to the person(s) you have named to the tee (such as that person dies, has a stroke, or just does not want the responsibility). Both the Estate Trustee(s) and the ustee(s) should be residents of Ontario.) |
| 1. Do you w | ant your spouse to be your Estate Trustee? Yes No Not Married |

| 2. | Who do you want to be your Esta | ate Trustee(s) after you (and you | ur spouse, if marri | ed) have died? |
|--------------|--|--|--|--|
| | Full Name | Relationship to You | Age | Telephone Number |
| | (1) | | | |
| | (2) | | | <u> </u> |
| | (3) | | | <u> </u> |
| 3. | Who do you want to be your alte | rnate Estate Trustee(s) after you | ı (and your spouse | e, if married) have died? |
| | Full Name | Relationship to You | Age | Telephone Number |
| | (1) | | | |
| | (2) | | | |
| | (3) | | | |
| BEN | NEFICIARIES: | | | |
| (Whe | n you die, how do you want your estate di | stributed?) | | |
| A. 1. | IF YOU HAVE A SPOUSE, Consection and go to B) Even while your spouse is alive, special furniture, to go to someour the estate being turned over to your special form. Yes No If Yes, are you going to prepare a | are there any particular assets, and other than your spouse (No. pouse. If your spouse predeceases you | such as a piece of te: If you make such a , it will also have prio | jewellery or an item of a gift, it will be taken out prior to prity over the gift to your children)? |
| | However, someone might che requirement of re-executing to honour your intentions as | prepared and signed <u>after</u> the expose to have such a list because one's Will. Furthermore, executexpressed in a memorandum to here the assets are principally of | the list can be east tors and families of your Will listing s | sily changed without the do, in most instances, choose specific assets and to whom |
| | | and the persons listed in your Vof your Will and referred to in y No | | |
| | If you do, name of pe | rson(s) and particular asset(s): | | |
| | Ful | l Name Asset | | |
| | (1) | | | |
| | (2) | | | |
| | (3) | | | |
| | (4) | | | |

| | Charity | Amount |
|---|--|--|
| (| 1) | |
| (| 2) | |
| | | |
| Does the ba | lance of your estate (called the "resi | due") go to your spouse? Yes No |
| If No, Detai | ls | |
| | | |
| | | |
| | | |
| For the part | of your estate which goes to your sa | pouse, are there any restrictions? Yes No |
| _ | | bouse, are there any restrictions: Tes two |
| II Yes, Deta | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| IF YOU <u>D</u> C | O NOT HAVE A SPOUSE, COM | PLETE THIS SECTION: |
| | | |
| Are there an | | of jewellery or an item of special furniture, to go to someone |
| Are there an | ny particular assets, such as a piece on the nake such a gift, it will have priority over t | of jewellery or an item of special furniture, to go to someone |
| Are there an (Note: If you n | ny particular assets, such as a piece on the nake such a gift, it will have priority over t | of jewellery or an item of special furniture, to go to someone the gift to your children, if any)? |
| Are there an (Note: If you n Yes If Yes, are y If Yes, p Howeve requiren to honou | ny particular assets, such as a piece of make such a gift, it will have priority over to No you going to prepare a list to be kept please note that a list prepared and so the someone might choose to have sufficient of re-executing one's Will. Further your intentions as expressed in a someone process. | of jewellery or an item of special furniture, to go to someone the gift to your children, if any)? somewhere? Yes No igned after the execution of your Will is not legally binding the a list because the list can be easily changed without the orthermore, executors and families do, in most instances, chose memorandum to your Will listing specific assets and to who |
| Are there an (Note: If you n Yes If Yes, are y If Yes, p Howeve requiren to honou they sho value. If No, do signed b | ny particular assets, such as a piece of make such a gift, it will have priority over to No You going to prepare a list to be kept oblease note that a list prepared and so are, someone might choose to have surface of re-executing one's Will. Further your intentions as expressed in a good go, especially where the assets are you want the items and the person | of jewellery or an item of special furniture, to go to someone the gift to your children, if any)? It somewhere? Yes No igned after the execution of your Will is not legally binding. In the list because the list can be easily changed without the exthermore, executors and families do, in most instances, cho memorandum to your Will listing specific assets and to who are principally of sentimental value rather than of great finances is listed in your Will or in a memorandum that is prepared as |
| Are there an (Note: If you n Yes If Yes, are y If Yes, p Howeve requirent to honouthey sho value. If No, do signed b legally b | ny particular assets, such as a piece of make such a gift, it will have priority over to No you going to prepare a list to be kept please note that a list prepared and sor, someone might choose to have surnent of re-executing one's Will. Further your intentions as expressed in a rould go, especially where the assets a poyou want the items and the person to you want the items and the person to you want the execution of your Will and | of jewellery or an item of special furniture, to go to someone the gift to your children, if any)? It somewhere? Yes No igned after the execution of your Will is not legally binding the a list because the list can be easily changed without the orthermore, executors and families do, in most instances, choosenemorandum to your Will listing specific assets and to who have principally of sentimental value rather than of great finances is listed in your Will or in a memorandum that is prepared and referred to in your Will (both methods cause the bequest to |
| Are there an (Note: If you n Yes If Yes, are y If Yes, p Howeve requirent to honouthey sho value. If No, do signed b legally b | ny particular assets, such as a piece of make such a gift, it will have priority over to No You going to prepare a list to be kept oblease note that a list prepared and sor, someone might choose to have sufficient of re-executing one's Will. Further your intentions as expressed in a rould go, especially where the assets a polyou want the items and the person objective the execution of your Will and beinding)? Yes No | of jewellery or an item of special furniture, to go to someone the gift to your children, if any)? It somewhere? Yes No igned after the execution of your Will is not legally binding. It is a list because the list can be easily changed without the orthermore, executors and families do, in most instances, choos memorandum to your Will listing specific assets and to who have principally of sentimental value rather than of great finances is listed in your Will or in a memorandum that is prepared and referred to in your Will (both methods cause the bequest to ticular asset(s): |
| Are there an (Note: If you n Yes If Yes, are y If Yes, p Howeve requirent to honouthey sho value. If No, do signed b legally b | ny particular assets, such as a piece of make such a gift, it will have priority over to No You going to prepare a list to be kept oblease note that a list prepared and sor, someone might choose to have sufficient of re-executing one's Will. Further your intentions as expressed in a rould go, especially where the assets a conjude of the execution of your Will and beinding)? Yes No | of jewellery or an item of special furniture, to go to someon the gift to your children, if any)? It somewhere? Yes No igned after the execution of your Will is not legally binding uch a list because the list can be easily changed without the orthermore, executors and families do, in most instances, changement of the principally of sentimental value rather than of great final solutions are principally of sentimental value rather than of great final solutions are greated to in your Will (both methods cause the bequest of tricular asset(s): Asset |

| | (3) | |
|---|--|--|
| | (4) | |
| Are there | e any charities to which you w | vant to leave money? Yes No |
| | Charity | Amount |
| | - | |
| | | |
| | | |
| What is t | to happen to the balance of yo | ur estate (called the "residue")? |
| | | |
| | | |
| | | |
| | | |
| - | | |
| | | |
| IF YOU | HAVE CHILDREN, COM | PLETE THIS SECTION: |
| However, y | you may not want everything divide | er spouse, if married) dies, the estate is divided among the children, usually equally. d equally among your children. In addition, you may want to make a gift to someone |
| your childr | | |
| your childi prior to the | ren. If you make a gift with priority e balance of the estate being divided | over the division of the residue among your children, it will be taken out of your esta |
| your childred prior to the Are there | ren. If you make a gift with priority e balance of the estate being divided | over the division of the residue among your children, it will be taken out of your esta d among them. |
| your children prior to the Are there Yes | ren. If you make a gift with priority e balance of the estate being divided e any particular assets, such as No | over the division of the residue among your children, it will be taken out of your esta d among them. |
| your childness prior to the Are there Yes If Yes, and If Ye Howe require to how | ren. If you make a gift with priority to balance of the estate being divided any particular assets, such as No re you going to prepare a list to s, please note that a list prepare ever, someone might choose to the rement of re-executing one's mour your intentions as express should go, especially where the | over the division of the residue among your children, it will be taken out of your estand among them. so a piece of jewellery or an item of special furniture, to go to someone? so be kept somewhere? Yes No red and signed after the execution of your Will is not legally binding. o have such a list because the list can be easily changed without the Will. Furthermore, executors and families do, in most instances, chooses seed in a memorandum to your Will listing specific assets and to whom |
| your childness prior to the Are there Yes If Yes, and If Ye Howe require to how they so value If No signe | ren. If you make a gift with priority to balance of the estate being divided any particular assets, such as No re you going to prepare a list to s, please note that a list preparever, someone might choose to the rement of re-executing one's mour your intentions as expressional go, especially where the company of the propagation of the propag | o be kept somewhere? Yes No red and signed after the execution of your Will is not legally binding. o have such a list because the list can be easily changed without the Will. Furthermore, executors and families do, in most instances, choosesed in a memorandum to your Will listing specific assets and to whom he assets are principally of sentimental value rather than of great financing the persons listed in your Will or in a memorandum that is prepared and in Will and referred to in your Will (both methods cause the bequest to be |
| your childness prior to the Are there Yes If Yes, and If Ye Howe require to how they so value If No signe | ren. If you make a gift with priority to balance of the estate being divided any particular assets, such as No re you going to prepare a list to s, please note that a list prepare ever, someone might choose to the rement of re-executing one's mour your intentions as expressional go, especially where the second of you want the items and the defore the execution of your second of your second of the execution of your second of your secon | over the division of the residue among your children, it will be taken out of your estand among them. Is a piece of jewellery or an item of special furniture, to go to someone? The best because the list can be easily changed without the will. Furthermore, executors and families do, in most instances, chooses and in a memorandum to your Will listing specific assets and to whom the assets are principally of sentimental value rather than of great financial the persons listed in your Will or in a memorandum that is prepared and in Will and referred to in your Will (both methods cause the bequest to be a piece of jewellery or an item of special furniture, to go to someone? No |
| your childness prior to the Are there Yes If Yes, and If Ye Howe require to how they so value If No signe | ren. If you make a gift with priority to balance of the estate being divided any particular assets, such as No re you going to prepare a list to s, please note that a list prepare ever, someone might choose to the rement of re-executing one's mour your intentions as expressionally go, especially where the second you want the items and the doctory the execution of your ly binding)? Yes No No | over the division of the residue among your children, it will be taken out of your estand among them. Is a piece of jewellery or an item of special furniture, to go to someone? The best because the list can be easily changed without the will. Furthermore, executors and families do, in most instances, chooses and in a memorandum to your Will listing specific assets and to whom the assets are principally of sentimental value rather than of great financial the persons listed in your Will or in a memorandum that is prepared and in Will and referred to in your Will (both methods cause the bequest to be a piece of jewellery or an item of special furniture, to go to someone? No |

| | (2) |
|----|---|
| | (3) |
| | (4) |
| | |
| 2. | In what proportions do you want the balance (called the "residue") of your estate divided among your children? |
| | Equally? Yes No |
| | If No, please provide particulars: |
| | |
| | |
| | |
| | |
| 3. | What will happen to the share of the child who dies before receiving any or all of his or her share? |
| | Divided equally among the children of that child (i.e. your grandchildren)? Yes No |
| | If No, do you want that child's share to go to your other children? Yes No |
| | If No to each of the above, please provide particulars: |
| | |
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| | |
| | |
| D. | THIS SECTION IS TO BE COMPLETED BY EVERYONE: |
| | (Your lawyer needs to know how you want your estate distributed if some or all of the persons mentioned in Sections A, B or C die |
| | before you do or dies in a common accident with you. For example, if you are married with children and you and your spouse and your children die in a common accident, how do you want to divide your estate? For further example, if you are not married and have left everything to a relative or a friend, but that relative or friend has died or dies in a common accident with you, how do you want to divide your estate? |
| 1. | Are there any particular assets (not already listed under this category in Sections A, B or C above), such as a piece of jewellery or an item of special furniture, to go to someone (i.e. to a friend, child or other family member)? |
| | If Yes, are you going to prepare a list to be kept somewhere? Yes No |
| | If Yes, please note that a list prepared and signed <u>after</u> the execution of your Will is not legally binding. However, someone might choose to have such a list because the list can be easily changed without the requirement of re-executing one's Will. Furthermore, executors and families do, in most instances, choose to honour your intentions as expressed in a memorandum to your Will listing specific assets and to whom they should go, especially where the assets are principally of sentimental value rather than of great financial value. |

If No, do you want the items and the persons listed in your Will or in a memorandum that is prepared and

| If you wa | nt the items and the | persons listed in your Will, name of person | (s) and particular ass |
|---|--|---|------------------------|
| | Full Name | Asset | |
| (1) | | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| Are there any charitie | es to which you wan | nt to leave money? Yes No | |
| Chari | • | Amount | |
| (1) | | | |
| · / | | | |
| (2)f someone that you l | nave named in Secten to the bequest that | ions A, B or C dies before you do, or dies in at you were intending to give to that person? | a common accident |
| (2) | nave named in Secten to the bequest that | ions A, B or C dies before you do, or dies in at you were intending to give to that person? | a common accident |
| (2) | nave named in Secten to the bequest that | ions A, B or C dies before you do, or dies in at you were intending to give to that person? | a common accident |
| f someone that you leaven, what is to happe | nave named in Secten to the bequest that | ions A, B or C dies before you do, or dies in at you were intending to give to that person? | a common accident |
| f someone that you leaven, what is to happe | nave named in Secten to the bequest that | ions A, B or C dies before you do, or dies in at you were intending to give to that person? | a common accident |

| E. | have a child or other benef | iciary over 18 but you want | AY WHO IS UNDER 18 YEARS OF AGE, OR you that person to have to WAIT UNTIL A LATER includes but is not limited to your own children): |
|-----------|--|------------------------------------|--|
| 1. | At what age are children or cestate? (Note: The age of ma | | nder 18 years of age to receive their share of your |
| | All at 18 years? Yes | No | |
| | • • | 1 0 1 | ntages at which minority beneficiaries are to receive and 50% at age 25; or else 100% at age 25, etc.): |
| | % at | years; | |
| | | years; | |
| | | years; | |
| | | · | |
| 3. | Yes No If the under-age beneficiary so the money, what do you wan | <u> </u> | reaching the age you specify that the person can have ce of that person's share? |
| GUA | ARDIAN: | | |
| 3 01 | (This section to be complete | d only by those with childre | under 18 years of age) |
| | (You can have an alternate Guard | ian. An alternate Guardian is ofte | n named in the event that something happens to the person you dies, has a stroke, or just does not want the responsibility). |
| 1. | Who is to be the Guardian (y death? | our first choice) of any child | ren you have who are under 18 years of age at your |
| | Full Name | Relationship to You | Address & Telephone Number |
| | | | W/S/K·IAW |

| 2. | | you want to be the all age at your death? | ternate Guardian (your secoi | nd choice) of any children you have who are under 18 |
|-----|--|---|---|--|
| | Full | l Name | Relationship to You | Address & Telephone Number |
| 3. | Have all | the Guardians been a | asked and are they willing to | |
| OTI | HER PRO | VISIONS: | | |
| 1. | • | of your beneficiaries te (for a disability or o | | ntally or receiving any type of Government financial |
| | | No | outer wise). | |
| | | | | |
| | | | | |
| | | | | |
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| | | | | |
| 2. | | _ | <u> </u> | where your Estate Trustee is holding your estate in you wish your Estate Trustee to have the following |
| 2. | trust for rights: (Note your | others, mainly childre e: the more powers yo estate without the bu | en. Please indicate whether our give to your Estate Trust | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer courts. However, you may have other reasons for |
| 2. | trust for rights: (Note your | others, mainly childre e: the more powers yo estate without the bu ing to restrict the pov | en. Please indicate whether our give to your Estate Trust rden of intervention by the overs of your Estate Trustee) | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer courts. However, you may have other reasons for |
| 2. | trust for rights: (Note your wish) | others, mainly childred e: the more powers yes estate without the buing to restrict the power a discretion to con | en. Please indicate whether our give to your Estate Trust rden of intervention by the overs of your Estate Trustee) vert your investments into co | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer courts. However, you may have other reasons for |
| 2. | trust for rights: (Note your wish) (a) | others, mainly childred e: the more powers yes estate without the but ing to restrict the pow a discretion to con a discretion to mai | en. Please indicate whether our give to your Estate Trust rden of intervention by the overs of your Estate Trustee) vert your investments into co | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer tourts. However, you may have other reasons for ash Yes No eir present form Yes No |
| 2. | trust for rights: (Note your wish) (a) (b) | others, mainly childred e: the more powers yestate without the but ing to restrict the power a discretion to con a discretion to main | en. Please indicate whether our give to your Estate Trust rden of intervention by the covers of your Estate Trustee) vert your investments into contain your investments in the | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer courts. However, you may have other reasons for ash Yes No eir present form Yes No No |
| 2. | trust for rights: (Note your wish) (a) (b) (c) | others, mainly childred e: the more powers yestate without the but ing to restrict the power a discretion to con a discretion to mai a right to invest the a discretion to invest | en. Please indicate whether our give to your Estate Trust rden of intervention by the overs of your Estate Trustee) vert your investments into contain your investments in the e residue of your Estate Yes est in mutual funds Yes | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer courts. However, you may have other reasons for ash Yes No eir present form Yes No No |
| 2. | trust for rights: (Note your wish) (a) (b) (c) (d) | others, mainly childred e: the more powers yestate without the but ing to restrict the power a discretion to con a discretion to mai a right to invest the a discretion to invest a right to hold a ch | en. Please indicate whether our give to your Estate Trust rden of intervention by the overs of your Estate Trustee) vert your investments into c ntain your investments in the e residue of your Estate Yes est in mutual funds Yes hild's share until a certain ag | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer tourts. However, you may have other reasons for ash Yes No eir present form Yes No No No |
| 2. | trust for rights: (Note your wish) (a) (b) (c) (d) (e) | others, mainly childred e: the more powers yestate without the but ing to restrict the power a discretion to con a discretion to mai a right to invest the a discretion to invest a right to hold a che a right to sell asset | en. Please indicate whether our give to your Estate Trusterden of intervention by the overs of your Estate Trustee) vert your investments into contain your investments in the residue of your Estate Yesest in mutual funds Yesest in mutual funds Yesest in estate until a certain ages (i.e. real estate, shares, your | you wish your Estate Trustee to have the following tee, the easier it is for the Estate Trustee to administer tourts. However, you may have other reasons for ash Yes No eir present form Yes No No No e or ages Yes No |

This is **NOT A WILL**.

This is an INSTRUCTION GUIDE ONLY, and is intended to be a guide for you in developing your final instructions to your lawyer. When you have completed this Form as much as you can, please MAKE AN APPOINTMENT TO SEE YOUR LAWYER AT Woynarski Szymura Kelly LLP to discuss your intentions. Please note that this instruction guide is not intended to be comprehensive as to the information that your lawyer may require in order to advise you in drawing up your Will, and your personal circumstances may require further discussion with your lawyer and instructions arising therefrom.



Suite 204, 420 Sheldon Drive Cambridge, ON N1T 2H9 Tel.: (519) 620-1162

Fax: (519) 620-1103