



T 780.410.0544 F 780.410.0566 TF 866.410.0544
170, 150 CHIPPEWA ROAD, SHERWOOD PARK, ALBERTA, CANADA T8A 6A2

PLEASE REPLY TO
ANDREW MCLAUGHLIN
PARTNER
DIRECT 780.410.0544 EXT 2
AM@TPLAW.CA

WILLS ESTATES TRUSTS
PROFESSIONAL RESPONSIBILITY

TURNING POINT LAW CLIENT PROFILE

TABLE OF CONTENTS

BASIC INFORMATION.....	2
PROPERTY AND FINANCIAL INVENTORY	5
LIABILITIES INFORMATION	10
INSTRUCTIONS FOR YOUR WILL.....	11
INSTRUCTIONS FOR YOUR ENDURING POWER OF ATTORNEY.....	14
INSTRUCTIONS FOR YOUR PERSONAL DIRECTIVE.....	15
RECORD OF ADVISORS AND LOCATION OF DOCUMENTS.....	17

Please click on our website address below to visit the Turning Point Law Website:

<http://www.tplaw.ca>

BASIC INFORMATION

The purpose of this part is to gather the basic personal information we require to draft your Documents.

Basic Information	
Full legal name	Other names you are known by
Current address	
Home phone	Cell phone
Email	Fax phone
SIN	Citizenship
Date of birth	Place of birth
How would you like us to communicate with you <i>Please note: If you use a work email your employer may have access to all our email communications and your Documents</i>	
<input type="checkbox"/> Email <input type="checkbox"/> Home phone <input type="checkbox"/> Cell phone <input type="checkbox"/> Work phone <input type="checkbox"/> Mail <input type="checkbox"/> Fax	
How did you hear about Turning Point Law?	

Children					
Do you have any children <input type="checkbox"/> yes <input type="checkbox"/> no If yes, please provide the following information (including the appropriate letter in the "Relation" column)					
C -	from your current relationship	SM -	from a prior marriage of your Spouse		
PM -	from a prior marriage	SR -	from a prior relationship of your Spouse		
PR -	from a prior relationship	A -	Adopted		
	Child's Full Name	Address and Phone Number	Relation	Date of Birth	Married? (Y/N)
1.					
2.					
3.					
4.					
5.					
6.					

Other Children

Are you Guardian or Custodian of any other children

yes no

If yes, please describe the circumstances (including custody and access arrangements) on a separate piece of paper.

Special Needs

Are you responsible for any mentally or physically disabled individuals?

yes no

If yes, please describe the circumstances (including information about the disability) on a separate piece of paper.

Grandchildren

Do you have any grandchildren

yes no

If yes, how many grandchildren and who are the parents of your grandchildren:

Current Relationship

Are you currently in a relationship

- no
- common law or adult interdependent relationship
- soon to be married
- married

If you are currently in a relationship please answer the following

What is the full name of your Spouse:

If you are in an adult interdependent relationship or a common law relationship, when did you start living together:

If you are planning to get married, when and where are you going to get married:

If you are married, when and where did you get married:

Do you have an adult interdependent relationship agreement, domestic agreement or prenuptial agreement yes no

Prior Relationships

Have you had a prior relationship

- no
 common law or adult interdependent relationship
 married

If you have had a prior relationship please answer the following

What is the full name of your former Spouse:

When did the relationship begin and end:

How did the relationship end death divorce separation

Do you have ongoing financial obligations for spousal or child support
If yes, please describe

yes no

Are there any limits on your ability to deal with your Estate (e.g., separation agreement,
minutes of settlement, domestic agreement)
If yes, please describe

yes no

PROPERTY AND FINANCIAL INVENTORY

The purpose of this part is to record information about your assets. This will allow us to consider your entire Estate when drafting your Documents. It will also assist your Attorney or Personal Representative to locate your assets. If there is not enough room to describe your assets, please put the particulars on an additional sheet of paper.

Financial Planner

If you have a financial advisor who has your financial information organized in a database (or if you have the information in a database) you can provide us with a printout or authorize us to discuss your personal finances directly with your financial advisor.

Do you have a financial advisor yes no

If you have a financial advisor please provide us with the following contact information.

Name:

Company:

Address:

Phone Number:

Email Address:

Once we have the contact information for your financial advisor there are two ways we can consult with them. You can contact your financial advisor and give them permission to talk to us, or you can fill this page, date and sign it, and then either drop it off at our office, fax it to us or scan it in and email it to us. We will then contact your financial advisor directly.

- I do not want you to contact my financial advisor
- I will contact my financial advisor and authorize them to discuss my financial information with you
- I would like you to contact my financial advisor

I, _____, hereby authorize and direct the above financial advisor to disclose all my personal financial information to **Turning Point Law** (170, 150 Chippewa Road Sherwood Park, AB T8A 6A2) and I authorize Turning Point Law to discuss my financial information with the above financial advisor and this shall be good and sufficient authority to do so.

date

signature

Employment		
What is your Current Employment Status <input type="checkbox"/> Employed <input type="checkbox"/> Not Employed <input type="checkbox"/> Retired If Employed please provide the following information		
Employer	Position	Annual Income

Real Property (Principal Residence)			
Street Address:			
Legal Description:			
Name(s) on Title:			
Ownership	<input type="checkbox"/> Sole	<input type="checkbox"/> Joint	<input type="checkbox"/> Tenants in Common
Market Value:	Amount Owing on Mortgage:	Is Your Mortgage Life insured	<input type="checkbox"/> yes <input type="checkbox"/> no

Other Real Property			
Street Address:			
Legal Description:			
Name(s) on Title:			
Ownership	<input type="checkbox"/> Sole	<input type="checkbox"/> Joint	<input type="checkbox"/> Tenants in Common
Market Value:	Amount Owing on Mortgage:	Is Your Mortgage Life insured	<input type="checkbox"/> yes <input type="checkbox"/> no

Other Real Property			
Street Address:			
Legal Description:			
Name(s) on Title:			
Ownership	<input type="checkbox"/> Sole	<input type="checkbox"/> Joint	<input type="checkbox"/> Tenants in Common
Market Value:	Amount Owing on Mortgage:	Is Your Mortgage Life insured	<input type="checkbox"/> yes <input type="checkbox"/> no

Title to Property
Would you like Turning Point Law to confirm title to your properties? (there is a \$25.00 charge per Alberta title) <input type="checkbox"/> yes <input type="checkbox"/> no

Bank Accounts

Financial Institution / Branch	Name(s) on Account	Joint? (y/n)	Type of Account	Average Balance
Approximate average balance of all accounts (in other words, how much do you normally keep in reserve)				

TSFAs, RSPs, RIFs and RESPs

Type	Financial Institution / Branch	Owner	Designated Beneficiary	Amount

Life Insurance

Type	Insurance Company	Insured	Designated Beneficiary	Amount

Verification of Beneficiaries

It is important that you verify the designations of beneficiary listed with your financial institutions and insurance providers. *Please note, events such as divorce, death, conversion of a RRSP to a RRIF, and change of group insurance carrier are all Turning Points that require you to review your designated beneficiary. We can discuss this further when we meet.*

Investments

Do you own any publicly traded stocks, mutual funds, trust units or other investments

Type	Issuer	Owner(s)	Purchase Price	Current value
Totals:				

Guaranteed Investment Certificates, Term Deposits and Bonds

Financial Institution / Branch	Owner(s)	Maturity Date	Amount

Pension Plans

Company	Owner	Designated Beneficiary	Amount

Valuable Personal Property

Please provide us with a list of any family heirlooms or personal property of exceptional value that you would like to inform us about on a separate page (i.e., art, silverware, coins, jewelry, rare or antique automobiles, mobile homes, boats, furs, etc.).

Other Types of Property and Expectations

Do you have an interest in any of the following:

- | | |
|---|--|
| Small business corporation | <input type="checkbox"/> yes <input type="checkbox"/> no |
| Farm land, farm business or farm corporation | <input type="checkbox"/> yes <input type="checkbox"/> no |
| Mines or minerals (including oil and gas interests and/or surface leases) | <input type="checkbox"/> yes <input type="checkbox"/> no |
| Intellectual Property (copyrights, trade marks, patents, etc.) | <input type="checkbox"/> yes <input type="checkbox"/> no |
| Website or domain name | <input type="checkbox"/> yes <input type="checkbox"/> no |
| Does anyone owe you money (e.g., personal loans, promissory notes, mortgages, etc.) | <input type="checkbox"/> yes <input type="checkbox"/> no |

Please provide additional information on any affirmative answers:

Small Business Corporation

Do you own shares in a small business (e.g., a company or farm corporation) yes no

If yes, please provide

The corporation's name:

The type of business the corporation carries on:

The names of the directors:

The names of shareholders along with the number and class of shares they hold:

Are there any restrictions on the shares that limit your Estate's ability to deal with the shares yes no

Is there a Unanimous Shareholders Agreement yes no

Does the company have any retained earnings? yes no

Are there any shareholders loans yes no

Any Other Assets

Do you own any assets not listed above (including timeshares, etc) yes no

If yes, please describe

LIABILITIES INFORMATION

The purpose of this chapter is to provide us with information about your current liabilities. This will allow us to consider your entire Estate when drafting your Documents. It will also assist your Attorney or Personal Representative to identify your obligations and pay your debts.

Liabilities				
Includes credit cards, mortgages, support payments, tax arrears, loans, lines of credit, judgments and other financial obligations not listed above				
Creditor	Type of Liability	Security	Amount owing	Monthly Payment

Other Obligations	
Do you have any other Obligations (e.g., Guarantees, Agreements for Sale, Promissory Notes, Co-signed Notes, Joint and Several Debts, Cash Calls, Revenue Canada, etc.)	<input type="checkbox"/> yes <input type="checkbox"/> no
If yes, please describe	

INSTRUCTIONS FOR YOUR WILL

The purpose of this part is to assist you to make the decisions necessary for your Will and to assist us to obtain the information we require to draft your Wills. It will also serve as a permanent record of your decisions.

Appointment of Personal Representative				
Your Personal Representative will administer your Estate after you pass away. If you appoint joint Personal Representatives (two people acting jointly as your Personal Representative) they will have to agree on all decisions and this can lead to unneeded frustration and stress. We therefore recommend that, if possible, you appoint one person as your Principal Personal Representative and one person as your Alternate Personal Representative.				
Principal	Full Name	Address	Phone Number	Relationship
Alternate	Full Name	Address	Phone Number	Relationship

Appointment of Guardians for Minor Children				
In Alberta, you can, in your Will, give the powers, responsibilities and entitlements of guardianship that you have when you pass away to whomever you want for your minor children. People normally name an individual person as sole Guardian or two people as joint Guardians.				
<i>Please note: If you name two people as joint Guardians of your children and one of them dies, the remaining Guardian will likely become your children's sole Guardian. For example, if you name your sister and her spouse as joint Guardians and your sister subsequently dies, the husband of your sister will then become the sole Guardian of your children.</i>				
Do you want to appoint the same person(s) you appointed as your Personal Representatives <input type="checkbox"/> yes <input type="checkbox"/> no				
If you would like different person(s) appointed please answer the following				
Principal	Full Name	Address	Phone Number	Relationship
First Alternate	Full Name	Address	Phone Number	Relationship

Willingness to Act
We recommend that you ask your Personal Representative(s), Guardian(s), Attorney(s), and Agent(s) to act prior to appointing them in your documents.

Pets
Do you have any pets you would like to make provisions for <input type="checkbox"/> yes <input type="checkbox"/> no
If yes, who would you like to give your pets to

Specific Gifts

Would you like to include a list of your desired distribution of your personal property with your Will? yes no
 (You fill in the list by hand after you have executed your Will. While the list is not legally binding, it gives your Personal Representative guidance on your desired distribution of your personal property)

Please list any specific gifts you would like listed in your Will (i.e., personal property, specific cash amounts or a percentage of your Estate). If you require more space, please use a separate page.

	Full Name of Child/Person/Charity	Relationship	Description of Gift / Percentage
1			
2			
3			
4			

Residue of Estate

Would you like the residue of your Estate (what is left in the Estate after all of your Estate's expenses and taxes have been paid and specific gifts have been delivered) divided between your children equally yes no

If you are not dividing your Estate equally between your children, please provide the following information.

	Full Name of Child/Person/Charity	Relationship	Percentage
1			
2			
3			
4			

Disposition of a Deceased Beneficiary's Share

How do you want to distribute the gift of a beneficiary who dies before receiving your gift. The deceased beneficiary's share can go to the deceased beneficiary's children and grandchildren (these options are common when leaving gifts to children or relatives), or to the other beneficiaries who are still alive (this is common when leaving gifts to friends).

A deceased beneficiary's share should go to

- The remaining beneficiaries
- The children of a deceased beneficiary, and if the deceased beneficiary has no children then alive, to the remaining beneficiaries (excludes the grandchildren of the deceased beneficiary)
- The issue of a deceased beneficiary (i.e., to the children of the deceased beneficiary, then to the grandchildren of the deceased beneficiary if the deceased beneficiary's child has also predeceased, and so on) and if the deceased beneficiary has no issue, to the remaining beneficiaries

Power of Encroachment

A Power of Encroachment gives your Personal Representative the power to access beneficiary's trust before they receive their full share (i.e., reach the age of distribution). You can give your Personal Representative **one or both** of the following powers, plus any additional specific powers you would like.

- For the beneficiary's maintenance, education, benefit and advancement in life
- To relieve the beneficiary's care-givers of additional financial burdens that come from caring for him or her

Age for Distribution

If there is any chance that any of your gifts may pass to a person who will not be mature enough to handle the gift, you should establish an age for distribution (please pick **one** of the following):

- Their entire share at age 18
- Their entire share at age 21
- Their entire share at age 25
- Other (please specify)
- One half at age 23 and the rest at age 27
- One third at age 21 and the rest at age 25
- One tenth at age 21, one third at age 25 and the rest at age 30

Ultimate Disposition Clause

We suggest you provide for the unlikely possibility that, despite all your planning, part of your Estate will be left with no one alive to receive it. If all of the above gifts fail, how would you like the residue of your Estate distributed.

A deceased beneficiary's share should go to (all these gifts are to individuals who are alive at the time of the distribution):

- Your siblings equally who are alive at the time of the gift
- Your siblings equally or, if any of your siblings predecease this gift, to their children
- Your nieces and nephews who are alive at the time of the gift
- Specific relatives, friends, churches and/or charities (please list below)

	Full Name of Child/Person/Charity	Relationship	Percentage
1			
2			
3			
4			

Compensation

The person appointed your Personal Representative is entitled to claim compensation for the time and effort involved in administering your Estate. The range for compensation is typically 2% of the overall Estate for a straightforward Estate to 5% of the overall Estate for a complex Estate (i.e., an Estate with numerous difficult to find beneficiaries, an Estate that ends up in litigation, or an Estate with business or farm succession issues).

What did you want to provide as compensation for your Personal Representative (please select one of the following)?

- no compensation or _____ % of the overall Estate or \$ _____ total compensation or \$ _____ per hour.

INSTRUCTIONS FOR YOUR ENDURING POWER OF ATTORNEY

The purpose of this part is to assist you to make the necessary decisions for your Enduring Powers of Attorney and to assist us to obtain the information we need to draft them. It will also serve as a permanent record of your decisions.

Appointment of Attorney				
<p>An Enduring Power of Attorney is a signed document in which you give a person (your "Attorney") the power to make decisions relating to your financial matters while you are alive but unable to make decisions on your own. It only takes effect when you lack the capacity to make financial decisions on your own (i.e., after a stroke, accident or the onset of senility). If you appoint joint Attorneys they will have to agree on all decisions and this can lead to unneeded frustration and stress. We therefore recommend that, if possible, you appoint one person as your Principal Attorney and a single person as your Alternate Attorney.</p>				
<p>Do you want to appoint the same person(s) you appointed as your Personal Representatives <input type="checkbox"/> yes <input type="checkbox"/> no If you would like different person(s) appointed please answer the following.</p>				
Principal	Full Name	Address	Phone Number	Relationship
Alternate	Full Name	Address	Phone Number	Relationship

Enduring Power of Attorney Trigger
<p>Your Enduring Power of Attorney can take effect when you sign the document and continue to be in effect after you become incapacitated ("Immediate Enduring Power of Attorney"), or your Enduring Power of Attorney can come into effect when you lose the capacity to make your own decisions relating to financial matters ("Springing Enduring Power of Attorney").</p> <p>If you want an Immediate Enduring Power of Attorney, check immediate below. If you want a Springing Enduring Power of Attorney, indicate who you would like to decide that you are incapacitated and that your Enduring Power of Attorney is in effect.</p> <p> <input type="checkbox"/> Immediate <input type="checkbox"/> Springing - Both your Attorney and treating physician agree that you are incapacitated <input type="checkbox"/> Springing - Two physicians agree that you are incapacitated </p>

Accounting
<p>We have found that giving an interested party the right to access information about how your Attorney is using and spending your assets can relieve tension in your family, especially when your Spouse is not your Attorney. Who would you like to be able to request a list of your assets, debts and transactions that have occurred from your Attorney?</p> <p> <input type="checkbox"/> Nobody <input type="checkbox"/> Any of my adult Children and/or alternate Attorney(s) unless my Spouse is acting as my Attorney <input type="checkbox"/> Any of my adult Children and/or alternate Attorney(s) regardless of who is acting as my Attorney <input type="checkbox"/> The persons listed below unless my Spouse is acting as my Attorney <input type="checkbox"/> The persons listed below regardless of who is acting as my Attorney </p>

INSTRUCTIONS FOR YOUR PERSONAL DIRECTIVE

The purpose of this part is to assist you to make the necessary decisions for your Personal Directives and to assist us to obtain the information we need to draft them. It will also serve as a permanent record of your decisions.

Appointment of Agent				
<p>A Personal Directive is a signed document in which you give a person (your "Agent") the power to make decisions relating to your personal matters while you are alive but incapacitated. It only takes effect when you lack the capacity to make these decisions on your own (i.e., after a stroke, accident or the onset of senility). If you appoint joint Agents they will have to agree on all decisions and this can lead to unneeded frustration and stress. We therefore recommend that, if possible, you appoint one person as your Principal Agent and a single person as your Alternate Agent.</p>				
Do you want to appoint the same person(s) you appointed as your Personal Representatives <input type="checkbox"/> yes <input type="checkbox"/> no If you would like different person(s) appointed please answer the following				
Principal	Full Name	Address	Phone Number	Relationship
Alternate	Full Name	Address	Phone Number	Relationship

How and When Will Your Personal Directive Come Into Effect?	
Who decides that you are incapacitated and that your Personal Directive is in effect	
<input type="checkbox"/> Both your Agent and your treating physician	
<input type="checkbox"/> Two physicians	

Minor Children			
Do you want your Agent to care for your minor children if you are incapacitated: <input type="checkbox"/> yes <input type="checkbox"/> no If no, who do you want to care for your minor children:			
Full Name	Address	Phone Number	Relationship

Access to Personal Information	
If you and/or your Spouse are incapacitated, do you want all your children to have access to your Personal Information? (Note: this allows all your adult children to view your healthcare information even if your Spouse is acting as your sole Agent) <input type="checkbox"/> yes <input type="checkbox"/> no	

Organ Donation	
Do you want your Agent to be able to donate your organs and tissues after you die? <input type="checkbox"/> yes <input type="checkbox"/> no	

Health Care Decisions

Please check the statements that reflect your wishes with respect to medical care

I want to be consulted on any Personal Decisions my Agent makes to the extent that it is feasible and in my best interests. yes no

I want care that enables me to remain as independent as possible, gives me comfort and support, facilitates my interaction with others, and relieves my pain and distress. yes no

I want regular personal contact with my family and friends who support me. yes no

I want to stay at home for as long as practical. If I am unable to stay in my home, I want my Agent to be able to decide whether I should be cared for in a nursing home, a palliative care hospice, a hospital, or other care facility. yes no

In case of severe pain or distress, my Agent may administer medications to relieve pain and distress even if they will hasten my death. yes no

If I am expected to regain the mental capacity to make my own decisions, I want all treatments that can reasonably be expected to enable me to recover. yes no

If I reach a stage where I am not expected to regain the mental capacity to make my own decisions,
(please choose either choice A or choice B):

A. I do not want my life prolonged at all costs. I do not want treatments that are intended primarily to prolong my life without improving the chances for cure or reversal of my condition. Further, I want my Agent to be able to consent to reductions in the intensity of medical intervention and I want to receive comfort care, including surgery and drugs, to relieve pain and reduce distress. choice A

B. I want my life prolonged as long as possible. I want all available treatments, including surgery, medications, CPR, ventilators, dialysis and tube feeding, and the use of extraordinary or heroic measures, to extend my life for as long as possible. choice B

I want my Agent to refuse, withhold or withdraw treatment to permit my life to come to its end if yes no

- a) My death is imminent if treatment is not commenced or continued,
- b) There is no reasonable medical expectation of recovery and
- c) I have lost the ability to interact with others and have no reasonable chance of regaining that ability.

If yes, when my Agent is deciding to refuse, withhold or withdraw medical treatment, I want my Agent to make the decision (please pick one of the following):

- after consulting with my treating physician
- after consulting with my treating physician and consulting with the person(s) listed below (if feasible)
- after consulting with my treating physician and if a majority of the persons listed below agree (if feasible)
- after consulting with my treating physician and if all the person(s) listed below agree (if feasible)

	Full Name	Address	Phone number	Relationship
1				
2				
3				

RECORD OF ADVISORS AND LOCATION OF DOCUMENTS

This section is optional, but filling it in will assist your Attorney and Personal Representative to locate your property. It may also assist your Agent to locate treating physicians.

Advisors	
Name of Advisor/Company	Address and phone
Wills and Estates Law Firm Turning Point Law	170, 150 Chippewa Road Sherwood Park, AB (780) 410-0544
Accountant	
Life Insurance Agent	
Property Insurance Agent	
Banker	
Doctor	
Pastor/Minister/Priest/Rabbi	

Location of Important Documents	
Will	
Enduring Power of Attorney	
Personal Directive	
Insurance Policies/ Annuity Contracts	
RRSP/RRIF Documentation	
Share Certificates/GICs/TDs	
Tax Returns	
Marriage / Divorce Material	

Safety Deposit Boxes
Location of Safety Deposit Box: