



## **WILLS, POWERS OF ATTORNEY AND ESTATE PLANNING PACKAGE FOR A SINGLE PERSON**

Our \$450.00 Wills, Powers of Attorney and Estate Planning Package includes:

Meeting with you to obtain relevant social and financial information;

Assessing that information and providing you with appropriate estate planning advice;

Providing you with "self-help" estate planning tips;

Explaining to you the nature and effect of a Power of Attorney for Property;

Explaining to you the nature and effect of a Power of Attorney for Personal Care;

Discussing with you the issues that need to be considered in deciding on the content of your will and powers of attorney;

Identifying any issues particular to you which suggest that a more sophisticated will or powers of attorney would be appropriate;

Explaining the nature and cost of a more sophisticated will or powers of attorney, if appropriate;

Discussing with you the nature of living wills or medical directives and how they relate to Powers of Attorney for Personal Care;

Taking your instructions on the content of your will and powers of attorney;

Drafting your will and powers of attorney based on your instructions;

Having the draft documents reviewed by another lawyer within our firm (peer review);

Adjusting your draft documents based on comments arising out of peer review;

Meeting with you to review your will and powers of attorney;

Providing you with a sample living will or medical directive and discussing this document with you;

Providing you with a sample format for a holograph codicil to be used for the disposition of personal items and discussing this document with you;

Answering your questions regarding your will and powers of attorney;

Adjusting these documents based on your feedback and instructions;

Instructing you on the execution of your will and powers of attorney;

Witnessing your signature on these documents;

Preparing, signing and having sworn an Affidavit of Execution for your will and attaching it to the original of your will;

Providing you with copies of your will and powers of attorney;

Instructing you on the proper storage and care of your copies;

Providing general guidance on when you should review your will and powers of attorney; and

Generally advising you and answering your questions regarding your will, powers of attorney, and related documents.

## **SERVICES DISPONIBLES EN FRANÇAIS**

## **SEE PAGE TWO FOR FREQUENTLY ASKED QUESTIONS**



## FREQUENTLY ASKED QUESTIONS

### ***Will I meet with a lawyer or a para-legal or secretary?***

You will meet with a lawyer.

### ***How many times will I have to come into your office?***

One of our lawyers will meet with you on two separate occasions, once to obtain the required information and instructions from you and once to review, adjust, and sign your wills and powers of attorney.

### ***Can I provide instructions by telephone?***

While it is our preference to see you in person to take instructions, we can take the initial instructions by telephone. However, you must attend at our offices to sign the final documents.

### ***How long will this process take from start to finish?***

In most cases, seven to fourteen days from the date of the first meeting with a lawyer.

### ***What sorts of things would result in me needing a more sophisticated will and powers of attorney?***

Unusual social or financial circumstances may result in the need for 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 in order to save probate or income taxes.

### ***What happens if I need a more sophisticated will and powers of attorney?***

The lawyer who meets with you will discuss your needs and advise you on the additional costs that would be involved. In the end, it will be up to you to decide on whether you want to proceed with more sophisticated documents.

### ***Should I bring existing Wills and Powers of Attorney with me?***

Yes, if you can readily locate them.

### ***What do I need to do to prepare for the first interview?***

You need not do any extensive preparation for the first interview. You will have most of the required information in your head. Any missing information or documentation can be provided after the interview.

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