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PERSONAL PLANNING GUIDE

Thank you for your interest in engaging Schnell Hardy Jones LLP to assist you with your personal estate planning documents. Your personal planning documents include a Will, Enduring Power of Attorney, Personal Directive, and may include a Supported Decision-Making Authorization. These additional documents deal with appointing someone to care for you or your estate on your incapacity. A Will only takes effect on death.

Please complete this Guide as best as possible to assist us in understanding your needs. The information collected in this Guide is the foundation of your documents. The usefulness of any advice that we provide is dependent upon the completeness and accuracy of the information provided. We have found that if we can narrow your concerns and questions from the beginning, your documents will be better customized to suit your personal needs. **We will not begin drafting your personal planning documents until we have received your completed Guide, or otherwise received full instructions from you.**

We ask that you return this Guide to us in advance of our initial appointment for review by your lawyer, with as much information completed as possible. During our appointment, we will discuss your estate plan in greater detail and strategies that we can implement in order to ensure your intentions are confirmed in your estate planning documents, and minimize the negative tax implications to the greatest extent possible. We may need to involve your financial professionals at this stage, if necessary, to confirm that we are optimizing income tax elections, rollovers, and similar features.

We appreciate that some of our clients have factors in their lives that complicate their personal planning needs. We will be able to identify those factors (such as second marriages, trusts, property outside Alberta) by the completeness of the Guide, and help identify potential solutions to address these concerns. Further discussion during our pre-drafting meeting will enable us to provide you with options and ideas to address these matters.

Should your personal planning documents need to be rushed, please contact us as soon as possible. Documents prepared on a rush basis will be a factor when calculating our fees.

Once you have provided instructions to us, we can begin the drafting process. It is always your choice which documents you want to complete but we do encourage our clients to put into place a complete personal planning package.

Thank you and we look forward to being of service to you.

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PERSONAL PLANNIN	NG GUIDE:		DAT	E:		
PERSONAL INFORM	ATION – INI	DIVID	UAL #1			
Full Legal Name			Other Names Know	ın By		
Home Address			City/Town	Province	2	Postal Code
Home Phone Number	Cell Phone Nur	nber			E-mail Ad	dress
Date of Birth			Citizenship/Resider	тсу	Occupatio	n
Work Address					Work Pho	ne Number
PERSONAL INFORM	ATION – INI	DIVID	UAL #2			
Full Legal Name			Other Names Know	n By		
Home Address			City/Town	Province		Postal Code
Home Phone Number	Cell Phone Nun	nber			E-mail Ad	dress
Date of Birth			Citizenship/Residen	ю	Occupatio	n
Work Address					Work Pho	ne Number
MARITAL STATUS						
□ Single (never married)	□ Widowed					
□ Getting Married		Date a	nd Place of Service:			
□ Separated □ Divorced		Date o	f Separation/Divorce:			
Common Law Partner	□ Married	Date o	f Cohab./Marriage:			
NOTE: If you have a separ similar type of agreement					nuptial ag	reement, any othe
SPECIAL CONSIDER	ATIONS					
Are any of your intended app	ointees or henefi	iciaries'	non-residents of Canac	la?	🗆 Yes 🛛	∃ No
Do you have any intended a have any other circumstance	ppointees or ben	eficiarie	s who are recipients o			opmental disability, o
If yes, does that per					□ Yes [

If there is a Represented Adult involved, do they have a Trusteeship Order currently?

CHILDREN

Please list all children, regardless of whether or not they are intended beneficiaries.

Full Name	City	Age
Full Name	City	Age
Full Name	City	Age
Full Name	City	Age
Are any of the listed children NOT the	biological or adopted children of both parties?	🗆 Yes 🗆 No
If yes, please list child(ren) and identi	fy who is the biological / adopted parent:	
Have any children predeceased you?		🗆 Yes 🗆 No
If yes, did that child leave ch	🗆 Yes 🗆 No	
GRANDCHILDREN		
Do you have grandchildren at this time	e?	🗆 Yes 🛛 No
If yes, are any of your grande	children minors (under the age of majority)	🗆 Yes 🛛 No
Do any of your grandchildren	or great-grandchildren reside with you	🗆 Yes 🛛 No
FUNERAL / BURIAL WISHE	S	
	INDIVIDUAL #1 INDIVID	UAL #2

	INDIVIDUAL #1	INDIVIDUAL #2
Disposition of remains:	□ Cremation □ Burial	□ Cremation □ Burial
Do you have a prepaid plot?	□ Yes □ No If yes, where:	□ Yes □ No If yes, where:
Do you have prepaid funeral arrangements?	□ Yes □ No If yes, where:	□ Yes □ No If yes, where:
Donation of organs?*	□ Yes □ No	□ Yes □ No
Donation of body (NOTE: donation of body requires pre-registration with program)*	\Box Yes \Box No IF YES, registration #	□ Yes □ No IF YES, registration #

***NOTE:** You cannot donate your body to medical research if you donate your organs.

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WILL INSTRUCTIONS

Please use this part as a guide to making some important decisions. We can discuss questions you may have so please do not feel you have to answer each section. If you cannot make a decision, we can make suggestions.

PERSONAL REPRESENTATIVE ("PR")

The Personal Representative is the person(s) appointed to administer your estate upon your death (used to be called "executor/executrix"). This person(s) is in a position of trust and bears a great deal of responsibility. It is necessary to ensure that your choice of Personal Representative is someone you trust implicitly, and that you are confident will administer your estate without delay, bias, or for personal gain. It is strongly recommended that you discuss any appointment with the person(s) prior to the execution of your estate planning documents to ensure that they are aware of their appointment and consent to act.

PR #1 General Spouse General Other:

(full name, relationship, municipality of residence)

PR #2	
(optional)	

(full name, relationship, municipality of residence)

Alternate PR #1

(full name, relationship, municipality of residence)

Alternate PR #2

(full name, relationship, municipality of residence) (optional)

GUARDIANS FOR MINOR CHILDREN

PLEASE NOTE, a surviving parent will automatically be appointed as the Guardian of your minor children, unless you have a court order or similar documentation authorizing sole custody/guardianship.

When selecting a Guardian / Alternate Guardian, reference the individual(s) you wish to appoint; they can always add their spouse/partner as a joint guardian after the fact, if they have to act.

Appoint surviving spouse as Guardian?

IF NO, name of surviving parent (and applicable child if children are from multiple relationships) OR primary Guardian if no surviving parent:

Name of the Alternate Guardian(s):

Full Name of 1st Alternate Guardian

Relationship to you

Municipality of residence

Full Name of 2nd Alternate Guardian

Relationship to you

Municipality of residence

GIFTS OR LOANS

If you have loaned money to an adult child(ren) or other beneficiary with:

- 1. the intent that loan would be repaid (directly or from their gift in estate); OR
- 2. the intent that the loan would be forgiven upon your death;

provide the particulars below including name and amount owing at date of will (put N/A or leave blank if doesn't apply).

□ Yes □ No

OTHER CONCERNS

Are there any other concerns you wish to address in your estate planning? (*i.e. Pets, Trusts for Represented Adults, concerns about addictions of beneficiary(ies), estranged family members, etc.*)

ASSETS AND DEBTS

The purpose of this section is to provide us with sufficient information to assist you in planning your estate and to ensure sufficient powers are included in your Will to dispose and deal with the asset. It also informs your executor(s) of all of your assets to make sure they do not miss any.

ASSETS		OWNERS Individual # solely	•	t D that applies) Individual #2 solely
Principal Residence Address:				
Legal Description:				
Current Value:	\$			
Mortgage amount:	\$			
Recreational/Farmla Address: Legal Description:	nd Property #1			
Current Value:	\$			
Mortgage amount:	\$			
Recreational/Farmla Address:	nd Property #2			
Legal Description:				
Current Value:	\$			
Mortgage amount:	\$			

Bank Accounts and Investments (name of financial institution and approx. current value)

Beneficiary Designated Assets (put N/A as required)

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			Individual #1 solely	Jointly	Individual #2 solely
Pension:					
Beneficiary?	□ Yes □ No	If yes, name(s)			
Life Ins.:					
	□ Yes □ No				
	□ Yes □ No	If yes, name(s)			
RDSP:					
	□ Yes □ No				
Beneficiary?	🗆 Yes 🗆 No	If yes, name(s)			
	estments (i.e. Mutual I	Funds, GICs, Term dep	osits, chequing & s	savings accour	<u>nts, etc)</u>
<u>(put N/A as re</u>					
Mutual Funds:					
Mutual Funds:					
GICs:					
GICs:					
GICs:					
Term Deposit:					
Term Deposit:					
Bank Account:					
Bank Account:					
Bank Account:					
Bank Account:					
Bank Account:					
-	rest in a business or				
□ Yes □ No	If yes: Sole prop	rietorship 🛛 Partr	er in Partnership	□ Sharehold	er in corporation
Name of business:					
□ You operate	□ Investment in priv	vate company only			
If a corporation, numb	per and class of shares:				
	on: Shareholder's Agreeme				

LIABILITY (check \Box that applies) **DEBTS** (other than mortgages) Individual #1 Jointly Individual #2 solely solely Line of Credit: Line of Credit: Line of Credit: Vehicle Loan: Vehicle Loan: П Other Loan: Other Loan: Other Loan: Credit Card: Credit Card: Credit Card: Credit Card: Personal Guarantee: Personal Guarantee: Personal Guarantee:

BENEFICIARIES

Your beneficiaries are the person(s) and/or organizations who you want to benefit from the net value of your estate (after all debts and expenses of the estate have been paid).

There are two types of gifts: Specific and Residue.

Specific gifts are particular items or dollar amounts that you want to go to those named individuals. Many specific gifts without significant monetary value can be dealt with through a memorandum of your wishes. This document is not legally binding, but usually the Persona Representative tries to comply with your wishes. This document does not need to be prepared at the same time as the will, and allows great flexibility to make changes as needed.

The residue of your estate is whatever remains after everything else has been paid out and distributed to specific beneficiaries. This clause needs to ensure that everything remaining in the estate has been distributed, and is usually divided between more than one beneficiary in percentages.

Any specific gifts to be included in the Will? (If yes, provide description and name of beneficiary(ies)

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If spouse/partner/first beneficiary predeceases you, then who becomes entitled to the residue?

TRUSTS FOR BENEFICIARIES

Type of Testamentary Trust required:

□ Trust for Minor Beneficiaries - Vesting

- Trustee same as PR?: □ Yes □ No If no, then name:
- Age when beneficiaries each receive capital of trust: AGE %

□ Discretionary Trust – Non-Vesting

- Can the Trustee contribute to beneficiary's RDSP if applicable and advisable?
 Yes No
- Any conditions or restrictions on use of trust funds? □ Yes □ No
 If yes, describe: ______
- Who will receive the balance of the capital of the trust, if any, upon the primary beneficiary's death?