PREPARING FOR AN ESTATE PLANNING MEETING

Being prepared for the interview with your lawyer will help to make the best use of time for both of you. Enclosed is our "Intake Information Form", which you should fill out as fully as possible and bring with you when you come to discuss your estate plan. You should also bring:

- Copies of any domestic contracts (separation agreements, marriage contracts, etc.);
- Copies of any business partnership agreements or shareholder agreements;
- Information on any private corporations (minute books, if they are available);
- Recent statements for your investments;
- Names of the beneficiaries under your life insurance policies and registered plans (RRSPs and RRIFs);
- Deeds to any real estate you own.

If you do not have all of the information to complete the form, however, **do not delay your appointment**. Just do the best you can, and come prepared to discuss the following issues:

- Who will manage your affairs when you are gone? Usually this is your spouse, if you have one, but you should also think about alternates.
- Who will be a guardian for your children if you have minor children?
- Who should manage your finances (while you are alive) if you are not able to?
- Who should talk to doctors and make medical decisions if you are not able to?
- What should happen if all of your immediate beneficiaries are gone?

If you are not completely sure about these issues, **do not delay your appointment**. Part of the service we offer is advising about who can act for you in these roles, and helping you take decisions about how to dispose of your estate.

At your first meeting you will be asked to sign a formal retainer. We do not usually ask for money to be deposited, but it is important for you to understand what information we retain and rely on and how long we keep information, what happens if there is a change in your circumstances (such as a disagreement between you and your spouse), and what services we provide. All of these matters are covered in our retainer.

The retainer will also set out how our fees are calculated. A Schedule of Fees will be discussed with you at our meeting. You may also see a copy of our "Standard Terms of Engagement For legal Services", as well as a number of factsheets on estate planning that you may find helpful at your first meeting.

Cunningham Swan offers a broad range of legal services to individual and corporate clients in the private and public sectors in Kingston and Southeastern Ontario. We welcome your inquiry: Cunningham Swan Carty Little & Bonham LLP, Suite 300 – 27 Princess Street, Kingston, ON K7L 1A3;Telephone: 613.544.0211; Facsimile: 613.542.9814; Email: info@cswan.com. ***This factsheet does not constitute legal advice.***