



**PAPERCLIP
LAW**

ESTATE PLANNING WORKBOOK

MEETINGS BY APPOINTMENT ONLY

NORTH VANCOUVER - SHIPYARDS

120 Lonsdale Ave
North Vancouver, BC
V7M 2E8

Clear the Form

☎ 604 973-0188

🖨 604 973-0189

✉ estates@papercliplaw.com

🌐 papercliplaw.com

HOW DOES THIS WORK?

Estate Planning always begins with a simple phone call to our friendly office at [604-973-0188](tel:604-973-0188) or email to estates@papercliplaw.com!



1 WE SET UP AN APPOINTMENT:

We will set up a 1st Meeting with one of our lawyers and ask that you complete as best you can ONE of these Workbooks per family (if your wills will be mirrors of each other) and send a copy back to us before the 1st Meeting by email.

3 WE DRAFT, AMEND AND FINALIZE:

Then we will draft the estate planning documents and after we process your 50% deposit or full payment, we will send you the drafts to review. We then amend and review the documents with you through email, Zoom or phone calls to answer your questions and finalize everything until you are ready to sign them.

2 WE MEET, VIRTUALLY OR IN-PERSON:

At the 1st Meeting, we will review the Estate Planning Workbook with you, lead you through the estate planning decision-making process and give you our advice about what we think would be best in your situation and what other families or people are doing in similar situation. This advice may include information about trusts, possible litigation, the probate process, and general tax laws. Please have your calendars ready as we often book our signing appointment at the end of the 1st Meeting.

4 WE REVIEW AND SIGN:

We will then meet in-person at our North or West Vancouver office (or other location) to sign the documents and provide you with the originally signed documents. We will also scan a copy to you by email but will not be making any hard copies. If you wish to have paper copies, the cost is \$20 per person and we will mail them to you after our meeting.

HOW LONG WILL THIS TAKE?

Well, honestly, we let you take the lead on this and depends entirely on how quickly you can make decisions. We usually leave you with a draft with blanks for any missing information or decisions that we require from you, and you can contact us when you're ready to start. Basically, you let us know how and when you want to proceed by choosing 1 of the following 3 options at the end of the 1st meeting.

FAST (WITHIN A WEEK)

If you would like your estate planning documents done and signed within asdasee of 20% of the legal fee. This option does not allow you to take advantage of our Extra Value Deal.

REGULAR (WITHIN A MONTH)

Generally, it takes us about 10-15 business days for us to email you a 1st draft of the documents for your review and comment. Then, depending on our schedules, we aim to meet with you to sign the documents over the following 5-10 business days. We find that in our experience, this takes about 30 (or so days). This option allows you to take advantage of our Extra Value Deal.

LATER (MORE THAN A MONTH)

You want to get back to us after having a chat with your family, thinking about the decisions you want to make or just digest the information we provided to you. This option does not allow you to take advantage of our Extra Value Deal.

HOW MUCH DOES THIS COST?

Because almost all of our clients believe that they have a “simple” or “basic” will (and that is not always the case from a legal perspective), it’s hard for us to give 1 price for every will out there. But, we want our clients to be able to budget for their estate planning, so we’ve tried to come up with a way that makes it easy for all of us.

All of our wills include some basic things such as executors, a trust fund for minor beneficiaries, a couple of charitable donations if you wish, funeral wishes and extensive powers of trustees.

Then you can customize your will if there are some specific reasons to do so, like: an illness or disability of a family member, loans or gifts to beneficiaries, shares in a private corporation, or will variation claims under WESA in a blended family or estranged child situation.

We can then discuss adding those into your Will to suit your situation.

Also, there are disbursements or out-of-pocket expenses that we incur as a result of your estate planning and depend on each case like title searches (around \$15 each), corporate searches (around \$10 each), and Wills Notice filing fees (around \$20 per person).

The Menu below outlines our legal fees per person, and on top of that, there will also be applicable disbursements and taxes.

	Price per person
Basic Will Only	\$750
Power of Attorney Only	\$525
Representation Agreement for Health Care (Living Will) Only	\$425
	\$1700
Extra Value Deal - Will - Power of Attorney - Representation Agreement for Health Care (Living Will)	\$1500
Optional Clauses - Spousal Trust/Life Estate - Disabled Beneficiary Trust - Pet Trust - Appointment of Corporate Trustee - Restricted Will	Save \$200 per person when all 3 documents signed at the same meeting! \$450 \$400 \$300 \$375 \$875

- Please also ask your lawyer during your initial meeting to see if you qualify for our additional Young Family Discount instead of the Extra Value Deal. Only one discount applies per family.
- We have a team of super awesome lawyers and articulated students to help you make all of these very important decisions and you may be working with any one or more of us, depending on availability. If you would like to work with someone specific, just ask! Please note that, except for the "Extra Value Deal", no discounts are applicable to meetings with Elizabeth Mah.

ESTATE PLANNING WORKBOOK

So, you've decided to at least get started. Trust us, we know that's a big step, especially when we're talking about life's most unpleasant what-if's. We're going to make this as easy as possible for you. Please complete this as best as you can so that you take full advantage of our meeting time. If you're stuck or need some help, don't worry about it, just skip it and move onto the next question you can answer - remember, we're here to help you through this process. Oh, and we just need one Workbook filled out per couple unless your wills will not be mirrors of each other.



Checklist of things to bring to our 1st scheduled meeting on _____

- ☒ This Information Sheet completed as best you can. ☐ If you own real estate, please bring the most recent Property Assessment(s) or Property Tax Assessment(s). ☐ 2 pieces of ID each. ☐ Access to calendar so we can schedule the Signing Meeting within 60 days. ☐ All your questions!

TELL US ABOUT YOU AND YOUR FAMILY.

YOUR CONTACT INFORMATION

Mailing address: _____
(cannot be a PO Box)

Your email address(es): _____

Your Spouse or Partner's email address(es): _____

By providing us with your email address(es), you are consenting to the use of it as a communication tool between you and Paperclip Law Corporation.

Home telephone _____

Business telephone _____

Mobile telephone _____

HOW DID YOU FIND OUT ABOUT PAPERCLIP LAW?

Friend _____
mind telling us who?

Google _____
what did you Google?

Professional _____
mind telling us who?

Other – how? _____

When do you need your estate planning documents completed? If there are less than 10-15 business days, then "Jump-the-Line" upgrade fees may apply.

☐ FAST (Withing a Week)

☐ REGULAR (Within a Month)

☐ LATER (More than a Month)

What is today's date? _____

How quickly do you need or would like to get your estate planning done? _____

Fast (within a week - add 25% fees)

Regular (within a month - regular discount)

Later (more than a month - no discounts)

Other special instructions (are you out of town or going on vacation soon?):

Your Basic Information



What is your **full legal name**?
(as it appears on your driver's license or passport)

Do you go by any **other names**?

What is your **date of birth**?

____/____/____
year month day

What is your **place of birth**?

____/____/____
city province or state country

What is your **citizenship(s)**?

Where is your principal place of **residence**?

____/____
province country

What is your **gender**?

☐ man ☐ woman ☐ two spirit ☐ non-binary
☐ None of the Above, I identify as: _____

What is your **marital status**?

☐ never been married
1 ☐ cohabiting _____ since when? _____
2 ☐ ceased cohabiting _____ since when? _____
☐ engaged or plans to marry _____ when? _____
1 ☐ married _____ when? _____
2 ☐ separated _____ since when? _____
2 ☐ divorced _____ when? _____
☐ widow/widower _____

Your Spouse or Partner's Basic Information

What is your **full legal name**?
(as it appears on your driver's license or passport)

Do you go by any **other names**?

What is your **date of birth**?

____/____/____
year month day

What is your **place of birth**?

____/____/____
city province or state country

What is your **citizenship(s)**?

Where is your principal place of **residence**?

____/____
province country

What is your **gender**?

☐ man ☐ woman ☐ two spirit ☐ non-binary
☐ None of the Above, I identify as: _____

What is your **marital status**?

☐ never been married
1 ☐ cohabiting _____ since when? _____
2 ☐ ceased cohabiting _____ since when? _____
☐ engaged or plans to marry _____ when? _____
1 ☐ married _____ when? _____
2 ☐ separated _____ since when? _____
2 ☐ divorced _____ when? _____
☐ widow/widower _____

1 If you checked a box next to any **1**, did you enter into any of the following agreements?

☐ No, then skip to the next page.

☐ Cohabitation ☐ Pre-nuptial or marriage ☐ Other _____

2 If you checked a box next to any **2**, please answer the following 3 questions:

Have any family law proceedings been started? ☐ Yes

☐ No

Have you entered into any agreements? ☐ No

☐ Separation

☐ Other

Are there any continuing financial obligations? ☐ No

☐ Spousal Support

☐ Child Support

Your family

Do you have any biological or adopted **children**?

☐ Yes (below)

☐ No (Go to Family Tree)



Child 1

First Name:

Middle Name:

Last Name:

Custody + Guardianship

Marital Status

Parent: _____

Parent: _____

Custody: _____

Guardianship: _____

Any children?

☐ Yes

☐ No

Date of Birth

year

month

day

Gender

☐ Male

☐ Female

☐ Two spirit

☐ Non Binary

☐ None of the Above, I identify as: _____

Child 2

First Name:

Middle Name:

Last Name:

Custody + Guardianship

Marital Status

Parent: _____

Parent: _____

Custody: _____

Guardianship: _____

Any children?

☐ Yes

☐ No

Date of Birth

year

month

day

Gender

☐ Male

☐ Female

☐ Two spirit

☐ Non Binary

☐ None of the Above, I identify as: _____

Child 3

First Name:

Middle Name:

Last Name:

Custody + Guardianship

Marital Status

Parent: _____

Parent: _____

Custody: _____

Guardianship: _____

Any children?

☐ Yes

☐ No

Date of Birth

year

month

day

Gender

☐ Male

☐ Female

☐ Two spirit

☐ Non Binary

☐ None of the Above, I identify as: _____

Child 4

First Name:

Middle Name:

Last Name:

Custody + Guardianship

Marital Status

Parent: _____

Parent: _____

Custody: _____

Guardianship: _____

Any children?

☐ Yes

☐ No

Date of Birth

year

month

day

Gender

☐ Male

☐ Female

☐ Two spirit

☐ Non Binary

☐ None of the Above, I identify as: _____

Have any children **died** before you?

☐ Yes

☐ No

Do any of the children have a disability or incapacity*?

☐ Yes

☐ No

Do you have any other **dependents** for financial support?

☐ Yes

☐ No

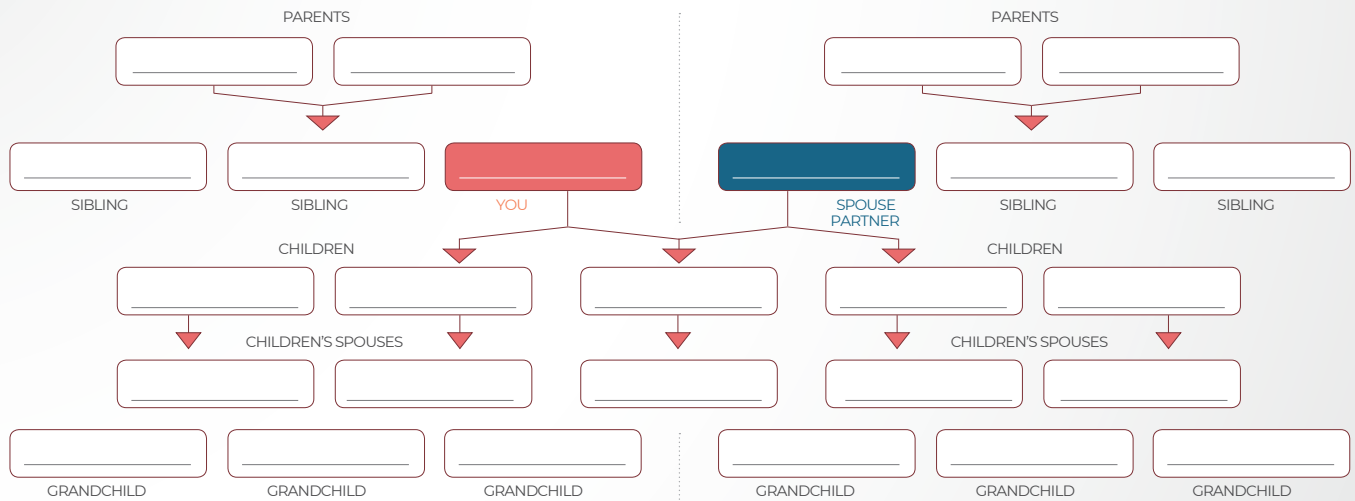
Are you currently serving as a legal **guardian** to anyone?

☐ Yes

☐ No

*Incapacity may mean, in your eyes, their inability to manage their own finances (because of addiction to drugs or alcohol, gambling or shopping or any other reason).

"Simple" family tree



Tell us about what you own and owe

You can either complete this section individually (one per person) or complete it together as a couple. We just need to understand what you own and owe, so just do whatever makes the most sense in your case and we'll chat through it during our meeting.

General

YOU

Are all your assets located in BC? ☐ Yes ☐ No - Where are those assets? _____

Did you want this Will to cover those assets too? ☐ Yes ☐ No ☐ Don't Know

SPOUSE

Are all your assets located in BC? ☐ Yes ☐ No - Where are those assets? _____

Did you want this Will to cover those assets too? ☐ Yes ☐ No ☐ Don't Know

Real Estate

Do you own any real estate?

Yes (below)

No (skip to Money)

	Property 1	Property 2	Property 3
Address	_____	_____	_____
Owner(s)	_____	_____	_____
Co-Owners Contract?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Approx Acquisition Date	_____	_____	_____
Approx Acquisition Cost	_____	_____	_____
How is the Real Estate used?	☐ Principal residence ☐ Recreational ☐ Investment or Rental ☐ Timeshare or other contract	☐ Principal residence ☐ Recreational ☐ Investment or Rental ☐ Timeshare or other contract	☐ Principal residence ☐ Recreational ☐ Investment or Rental ☐ Timeshare or other contract
Is there a mortgage?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Is mortgage insured?	☐ Yes ☐ No ☐ Don't Know	☐ Yes ☐ No ☐ Don't Know	☐ Yes ☐ No ☐ Don't Know

PAPERCLIP LAW TO COMPLETE

PID from Assessment	_____	_____	_____
Ownership	☐ Sole ☐ JT ☐ TIC	☐ Sole ☐ JT ☐ TIC	☐ Sole ☐ JT ☐ TIC



How are your bank accounts owned?

All joint with right of survivorship with each other

All in _____'s name alone (approximate value: \$_____)

All in _____'s name alone (approximate value: \$_____)

Some joint with survivorship + some in our own names

\$_____ [approximate value] in _____'s name

\$_____ [approximate value] in _____'s name

Joint with right of survivorship with _____ [someone else]

\$_____ [approximate value] in joint names

Other ownership: _____

How are your investments owned?

All joint with right of survivorship with each other

All in _____'s name alone (approximate value: \$_____)

All in _____'s name alone (approximate value: \$_____)

Some joint with survivorship + some in our own names

\$_____ [approximate value] in _____'s name

\$_____ [approximate value] in _____'s name

Joint with right of survivorship with _____ [someone else]

\$_____ [approximate value] in joint names

Other ownership: _____

	You	Your Spouse or Partner
Do any of you have an RRSP or RRIF?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____
Are any of you a Subscriber for an RESP?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____
Do any of you have a TFSA (Tax Free Savings Account)?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____
Do any of you have a pension plan (other than CPP)?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____ Who is the employer or administrator of the pension plan? _____	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____ Who is the employer or administrator of the pension plan? _____
Do any of you have a life insurance policy?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____ What type of policy is it? ☐ Work – what is the face value? \$ _____ ☐ Other – what is the face value? \$ _____ Has your policy been reviewed in the last 2 years? ☐ Yes ☐ No – do you want a review?	☐ No ☐ Yes, then who is the designated beneficiary? ☐ Spouse ☐ Don't know ☐ Other: _____ What type of policy is it? ☐ Work – what is the face value? \$ _____ ☐ Other – what is the face value? \$ _____ Has your policy been reviewed in the last 2 years? ☐ Yes ☐ No – do you want a review?
Do any of you have a safety deposit box?	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____
Do any of you own any vehicle(s) or boat(s)?	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____
Do any of you have any club membership(s)?	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____	☐ No ☐ Yes, in my name alone ☐ Yes, joint with _____

Business

Do you own a business?

☐ No ☐ Yes

What is the name(s) of your business? _____

What is the nature of your business? _____

Is it a professionally regulated business?
(accountant, medical services, architect, etc.)

☐ No ☐ Yes _____

How is it registered?

☐ Proprietorship

☐ Partnership

☐ Company

Who are the director(s)? _____

Who are the shareholder(s)? _____

Is there a shareholders' agreement?

☐ No ☐ Yes

Is there life insurance?

☐ No ☐ Yes

Does the business have any debt?

☐ No ☐ Yes

Does the business have a succession plan?

☐ No ☐ Yes



If you own shares of a private company, we should chat more about creating a separate will called a **Restricted Will**. The advantages of having this type of Will are: (1) the value of your shares in a private company along with any shareholder loans due to you would not be subject to the probate process; (2) savings of probate taxes of 1.4% on the value of the shares and shareholder loans; and (3) privacy for corporate matters.

I'd like to chat about **Restricted Wills**: ☐

Debts and Loans

Other than any mortgages already mentioned, do you have any **other debts**?

☐ No ☐ Yes

Are you the guarantor or covenantor for any debt?

☐ No ☐ Yes

Have you loaned any money to anyone?

☐ No ☐ Yes – is it forgiven?

Other

Are you the **beneficiary** in anyone's will?

☐ Not that I'm aware

☐ Yes

☐ Don't Know

Are you named as an **executor** in anyone's will?

☐ Not that I'm aware

☐ Yes

☐ Don't Know

Are you appointed a **Power of Attorney** for anyone?

☐ Not that I'm aware

☐ Yes

☐ Don't Know

Are you appointed a **Representative** for anyone?

☐ Not that I'm aware

☐ Yes

☐ Don't Know

Any other **assets** or **debts** ?

☐ Not that I'm aware

☐ Yes

☐ Don't Know

Your Will

Executor



Picking your Executor is the most important decision in your Will. The Executor is like the boss of your Will, stepping in your shoes and has the overriding decision-making power to make funeral arrangements, organize what you own and owe, manage your business, instructs lawyers + real estate agents + accountants + investment advisors. You can pick 1 person or more than 1 person jointly on a team, and we suggest you pick back-ups in case they don't want to do it at the time or can't. But overall, you must trust that person or those people entirely and they must be 19 years of age or older.

Your 1st Choice Executor is usually your spouse or partner, if you have one.

	1st Choice Executor(s)	Back-Up Executor(s)	2nd Back-Up Executor(s)
How will they act?	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority
Full Legal Name			
Mailing Address (No PO Box)			
Resident of Canada?	☐ Yes ☐ No	☐ Yes ☐ No	☐ Yes ☐ No
Relationship to You			

Guardian for Children Under 19 Years Old

will is the only legal document in BC where you can pick a guardian for any children under 19 that you have custody and guardianship. The other biological parent will be the default guardian if there is joint custody and guardianship. If 1 parent has sole custody and guardianship, then that parent may designate a guardian.

Your 1st Choice Guardian is usually your spouse or partner, if you have one.

	1st Choice Guardian(s)	Back-Up Guardian(s)	2nd Back-Up Guardian(s)
How will they act?	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority	☐ 1 person ☐ Jointly on a Team ☐ If jointly, ☐ unanimous ☐ majority
Full Legal Name			
Mailing Address (No PO Box)			
Relationship to You			

Guardian for Pets

You may name a Guardian for any pets you may own.

	1st Choice Pet Guardian(s)	Back-Up Pet Guardian(s)	2nd Back-Up Pet Guardian(s)
Full Legal Name			
Mailing Address (No PO Box)			

Personal Items (Optional)



If there are specific personal or sentimental items that you would like to leave to a person or organization (100% tax credits if to a registered charity), there are generally 2 options:

- ☐ **Letter of Wishes.** You can state your wishes in a letter of wishes, date it, sign it and store it with your Will. Your instructions will not be binding on your Executor, so you would need to trust your Executor to carry your wishes out.
- ☐ **Put it in the Will.** We can state your wishes for these personal items in your Will, which will make these instructions binding on your Executor to carry out, but each time you want to add an item or remove an item, you will have to re-execute a new Will or sign a codicil.

	Gift or Personal Item 1	Gift or Personal Item 2	Gift or Personal Item 3
Item Description			
Beneficiary's Full Legal Name			
Pays for Shipping	☐ estate ☐ beneficiary	☐ estate ☐ beneficiary	☐ estate ☐ beneficiary

Cash Gifts or Donations (Optional)

If you wish to make gifts or donations of cash or accounts to a person or to an organization, what are they?

	Cash Gift or Donation 1	Cash Gift or Donation 2	Cash Gift or Donation 3
Amount or Account			
Beneficiary's Full Legal Name			

Memorial Wishes

Do you have any specific funeral or memorial wishes?

- ☐ Burial
- ☐ Cremation with ashes scattered _____ or interred _____
- ☐ Simple Memorial
- ☐ Wake
- ☐ Leave all decisions to the discretion of _____ (My Executor(s), my children, other?)



Have you made any prepaid arrangements:

- ☐ No ☐ Yes, with _____

Storage I will be storing my originally signed Will, and other originally signed legal documents in:

- ☐ My Safety Deposit Box at _____ [Bank] located at _____ [Branch Address]
- ☐ My Home Safe
- ☐ Other Storage Location

Let's get started!

In order to get started, we will require your credit card number.

We will be working hard to get you almost final drafts in the next 5-10 business days. Once we have those ready, we will be sending you an invoice for either half of the work or the full bill and the disbursements, since we'll be mostly done.

There may be additional fees if you make significant amendments (don't worry, we'll talk about that if that's the case).



Type of Credit Card:

☐ Visa☐ Mastercard

Cardholder's Name on Credit Card: _____

Card Number: _____ Expiry Date: _____ (M)/ _____ (Y)

Signature of Cardholder: _____

Today's Date: _____, 20 _____

Come in to sign your estate planning documents.

Monday ☐ am ☐ pm

Tuesday ☐ am ☐ pm

Wednesday ☐ am ☐ pm

Thursday ☐ am ☐ pm

Friday ☐ am ☐ pm

Saturday ☐ am ☐ pm

Sunday ☐ am ☐ pm



☐ SHIPYARDS
120 Lonsdale Ave
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☐ I want to know about
other community
meeting spots

☐