Here are some questions to help you:

- Do you want to leave as large an estate as possible for your spouse, children or grandchildren?
- Do you want to provide for a child or adult who has a special physical or mental need?
- Do you want transfer your business to a family member?
- Do you want to contribute to your favourite charity?
- Is you will up to date? Have you specified how your assets are to be distributed?
- Do you know what the income amount will be for your spouse / family if you die first?
- Do you know what the income amount will be for you if your spouse dies first?
- Do you wan to stay in your home? Do you want it to stay in the family?
- Do you want your cottage or some other asset to "stay in the family"?
- Do you know what the tax exposure is on your estate?
- Do you know how any taxes will be paid?
- Are you concerned if CCRA (Revenue Canada) is your largest single heir?
- How important are tax strategies to you:

  Minimize taxes and be totally consistent with your overall plan?

  Minimize taxes and stay as consistent as possible to your overall plan?

  Minimize taxes at all costs?

- Many of your assets may have to go through probate and become part of public record.

How important is privacy to you?

- Can you describe in a paragraph what you want to happen to your wealth when you die? Who gets what and how much?

For more information contact:

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