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. Here is a list of material you should bring, and information you should have ready when you come to discuss your estate plan:

- your full name, including any former names and nicknames and any different combinations of names you have used;
- your address and telephone number for all your residences (cottage, winter residences, etc) and your workplace;
- your date and place of birth, your citizenship and social insurance number;
- full names, addresses, and dates of birth for your potential beneficiaries (spouses, children, grandchildren, etc.);
- names, addresses and telephone numbers for your professional advisors (accountant, financial planner, family doctor);
- 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;
- the names of the beneficiaries under your life insurance policies and registered plans (RRSPs and RRIFs);
- the title to any real estate (bring a copy of the deed if it is available).

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, 1473 John Counter Blvd., City Place II, Suite 201, Kingston, ON, K7M 8Z6;Telephone: 613.544.0211; Facsimile: 613.542.9814; Email: info@cswan.com. ***This factsheet does not constitute legal advice.***