

Why Keep it Secret?

personal information of:



ANDERSON FOSS

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Barristers, Solicitors, Notaries

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Introduction

We hope this booklet will assist you in the preparation of your estate plan including your Will and Powers of Attorney. For your lawyer to properly understand your situation and advise you, it is essential to have a summary of assets and manner of ownership.

It is also helpful for your family and survivors to be able to quickly and easily access this information in order to manage your affairs. We recommend that you retain this Booklet in a place where you will refer to it periodically in order to update the information and that you ensure your family or survivors know where to locate it.

The firm of Anderson Foss is located in a designated heritage building on beautiful Stewart Park in downtown Perth. The office is handicapped accessible and appointments can be arranged at home and after normal business hours. For further information on our firm and staff, please visit our website www.andersonfoss.ca

Greg W. Anderson, B.A., J.D.

Certified by the Law Society of Upper Canada as a Specialist in Estates & Trusts Law

Mary J. E. Foss, B.A., J.D.

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Greg W. Anderson, B.A., J.D

Email: greg@andersonfoss.ca
Tel: 613-267-9898 x1

Greg Anderson was born in Neepawa Manitoba. He lived in Perth from 1958 until 1963 where his father, Douglas Anderson, was the minister at St. Andrew's Presbyterian Church. The family then moved to Montreal where Greg attended high school and university. In 1971, Greg graduated with a BA in Honours Linguistics from McGill University. He then continued his studies in Linguistics for two years at the University of Stuttgart in Germany before entering law school.

After graduating from the University of Toronto Law School in 1976, he returned to Perth and articulated with the late Gerald Dulmage. At his call to the Bar in 1978, he was awarded the Birnbaum Scholarship in estate planning. Greg remained in Perth to practise law with Gerald Dulmage, Jim Bond and Stephen March. In 1996 the firm re-organized and Greg continued in partnership with Stephen March until Stephen's appointment in April 2000 as a Judge of the Ontario Court of Justice. In 2011, Greg's legal assistant Mary Foss was called to the Bar and now practises law with Greg.

Greg specializes in the area of estate planning and administration. Since 2001, Greg has been a member of the Society of Trust and Estate Practitioners. In 2005, he was certified as a Specialist in Estates and Trusts Law by the Law Society of Upper Canada.

Since returning to Perth in 1976, his interests and involvement in the community have included:

- president and director of the Perth Rotary Club
- member and director of the Links O'Tay Golf and Country Club
- president of Big Brother and Big Sisters of Lanark County
- chairman of Board of Managers of St Andrew's Presbyterian
- Church founding director and first president of the Perth and District Community Foundation

In 2005 Greg was honoured to be awarded the Perth Medal for Community Service. His pastimes include golf, music and photography. Greg is married to Marnie and they have twin children, Paul and Kathy. Paul stayed in Perth and Kathy works as a video editor in Toronto.



Mary J.E. Foss, B.A., J.D

Email: mary@andersonfoss.ca
Tel: 613-267-9898 x2

Mary was born and raised in Manotick, Ontario and her parents still live in the house she grew up in. She graduated with a B.A. in Law from Carleton University in 1988 and then worked as a legal assistant with the Manotick and Ottawa law firm of Wilson, Monaghan.

When Mary and her husband Greg moved to Lanark Highlands in 1993, she started her career at the firm as a legal assistant to Greg and his former partner Stephen March; managing their real estate and municipal law practices.

In 2005, the University of Ottawa Law School accepted Mary's application to law school. For the next 6 years Mary attended law school part time while continuing as a legal assistant with the firm.

In 2009, she was awarded the Osler, Hoskin & Harcourt LLP prize for the highest standing in advanced taxation and in June 2011, Mary graduated cum laude. Mary articulated with Greg and was called to the Bar of the Law Society of Upper Canada on September 21, 2011.

Mary concentrates her practice in the areas of real estate, mortgages, municipal law and civil litigation.

Mary is enthusiastic about rural life, painting, traditional handcrafts, and dogs - their black Lab is named Teal.

Mary and her husband Greg live with their daughter Shannon in former Dalhousie Township.

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Vital Statistics

My name is:

FullName: _____

Date of Birth: _____

Place of Birth: _____

Location of Birth Certificate: _____

Social Insurance Number: _____

Marital status : married common law single

My spouse's name is:

FullName: _____

Date of Birth: _____

Place of Birth: _____

Location of Birth Certificate: _____

Social Insurance Number: _____

Our Children:

Full Name: _____

Date of Birth: _____

Place of Birth: _____

Address: _____

Spouse: _____

Grandchildren and dates of birth: _____

Full Name: _____

Date of Birth: _____

Place of Birth: _____

Address: _____

Spouse: _____

Grandchildren and dates of birth: _____

Full Name: _____

Date of Birth: _____

Place of Birth: _____

Address: _____

Spouse: _____

Grandchildren and dates of birth: _____

Full Name: _____

Date of Birth: _____

Place of Birth: _____

Address: _____

Spouse: _____

Grandchildren and dates of birth: _____

Other information:

Stepchildren -names

Special needs and disabilities: -details

If Single:

Full name of next of kin or best friend: _____

Relationship: _____

Address: _____

Telephone: _____

Wills and Powers of Attorney

My lawyer is:

Greg Anderson

Mary Foss

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My Estate Executors are:

1. _____

Address _____

Telephone _____

2. _____

Address _____

Telephone _____

My Attorneys for Property are: same as above or

1. _____

Address _____

Telephone _____

2. _____

Address _____

Telephone _____

My Attorneys for Personal Care are:

[] same as above or:

1. _____
Address _____
Telephone _____

2. _____
Address _____
Telephone _____

My original Will and Powers of Attorney are held in safekeeping by my lawyer
or _____

My family doctor is:

Name _____
Address _____
Telephone _____

A copy of any Advance Medical Directive or "Living Will" I may have is filed
with my Doctor and the original copy is located: _____

My accountant is:

Name _____
Address _____
Telephone _____

Copies of my income tax returns are held by my accountant [] or are located:

The following are current addresses of beneficiaries of my estate:

1. Name: _____
Mailing Address: _____
2. Name: _____
Mailing Address: _____
3. Name: _____
Mailing Address: _____
4. Name: _____
Mailing Address: _____
5. Name: _____
Mailing Address: _____
6. Name: _____
Mailing Address: _____
7. Name: _____
Mailing Address: _____
8. Name: _____
Mailing Address: _____
9. Name: _____
Mailing Address: _____
10. Name: _____
Mailing Address: _____

General Information:

A successful estate plan ensures that your affairs are managed properly in the event of your incapacity and that your estate is administered in accordance with your wishes in a timely and cost effective manner. If you have registered any assets in joint names or you have designated a beneficiary, it is important to review this with your lawyer to ensure your intentions are clear.

You should explain to your Attorneys the circumstances in which the Powers of Attorney are to be used and you should advise them to contact your lawyer in the event that it is necessary to act on your behalf.

We also strongly recommend that you discuss and confirm with your Attorneys for Personal Care and your physician your wishes for your personal care and treatment in the event of your incapacity.

Your Executors and your Attorneys must know where your documents and this Booklet are located. At the end of this booklet, you may wish to outline wishes and guidelines for your Executors, Attorneys and Guardians of your children.

The executors must be contacted immediately upon a death as the executors are responsible for all arrangements and to ensure that all assets are protected.

Your Wills and Powers of Attorney should be reviewed periodically with your lawyer in case of a change of legislation and they should be reviewed whenever there is any change in your personal circumstances including the following:

- if you separate, divorce or marry; (marriage revokes a Will)
- if there is a change in your family; you have children, adopt children or become a step-parent;
- if an executor or attorney dies or becomes unsuitable to act due to age, ill-health, etc.
- if a beneficiary dies;
- if you have specifically bequeathed any property which you subsequently sell, or which changes its nature;
- if you change your name, or anyone mentioned in the Will or Powers of Attorney changes theirs;
- if your estate increases or decreases significantly.
- If you wish at any time to revoke or alter your Will or Powers of Attorney, you should consult your lawyer to ensure all legal requirements are fulfilled, otherwise, your wishes may not take effect.

Documents and Passwords

I have made duplicate copies of important documents and I have left coded information on computer passwords, PINs, user and access codes.

These are held:

In my desk at home: Yes No

or other location: _____

Organizations and Persons to be Notified:

Name: _____

Address: _____

Contact: _____

Name: _____

Address: _____

Contact: _____

Name: _____

Address: _____

Contact: _____

Name: _____

Address: _____

Contact: _____

Name: _____

Address: _____

Telephone: _____

Name: _____

Address: _____

Telephone: _____

Life Insurance

I carry Life Insurance Policies as noted below:

Name of Company _____

Policy Number: _____

Policy Amount: _____

Policy held at: _____

Beneficiary: _____

Name of Company _____

Policy Number: _____

Policy Amount: _____

Policy held at: _____

Beneficiary: _____

Group Life Insurance

My Group Life Insurance is carried by my employer. He should be notified at once.

Name of Employer: _____

Amount Group Insurance: _____

Office / Person to Contact: _____

Address: _____

Beneficiary: _____

Health Insurance

I carry government health insurance as well as policies for supplementary coverage. These are listed below:

Name of company: _____

Policy or certificate number: _____

Address of Company: _____

Property Insurance

I carry Property Insurance as noted below:

Name of Company: _____

Policy Number: _____

Policy Amount: _____

Property Covered: _____

Policy held at: _____

Name of Company: _____

Policy Number: _____

Policy Amount: _____

Property Covered: _____

Policy held at: _____

Pension Plans

My employer carries a Pension Plan in which I participate: Yes No

For information, my employer should be contacted or:

Savings Plans

Including:
Registered Retirement Savings Plans
Registered Retirement Income Funds
Tax Free Savings Accounts
Registered Disability Savings Plan
Registered Education Savings Plans
Annuities

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Company _____
Account _____
Beneficiary - estate or _____

Bank Accounts

I have bank accounts as listed below:

Name of Bank or Trust Company: _____

Branch Address: _____

Account Number: _____

Name of Bank or Trust Company: _____

Branch Address: _____

Account Number: _____

Name of Bank or Trust Company: _____

Branch Address: _____

Account Number: _____

Safety Deposit Boxes

I have a Safety Deposit Box or Safekeeping Privileges at:

Name of Bank or Trust Company: _____

Branch Address: _____

Box Number: _____

Key Located at: _____

Investments

I have investments such as stocks, bonds and notes. These are in my safety deposit box (see Safety Deposit Boxes), or with my broker who is:

Name of Brokerage Company: _____

Address: _____

Contact: _____

A summary listing of my investments is filed with this Booklet or is located at:

Real Estate

I have the following real estate:

Type of Property: _____

Location: _____

Mortgages (name, account number, balance): _____

Type of Property: _____

Location: _____

Mortgages (name, account number, balance): _____

Type of Property: _____

Location: _____

Mortgages (name, account number, balance): _____

Collections

I am a Collector. This collection should be evaluated by a proper appraiser:

I collect: _____

Collection held at: _____

I collect: _____

Collection held at: _____

Loans and Credit Cards

I have the following credit cards:

1. Visa account number: _____

2. Mastercard account number: _____

3. American Express account number: _____

4. Bank loan _____

5. Car loan _____

6. Line of Credit _____

Balances are life insured : yes no

Family loans and other debts:

Estimated Estate Value

Update Annually

Date _____ Date _____ Date _____ Date _____ Date _____

Insurance
death benefits:

Value
of registered plans
before tax:

Value of all other
assets:

Gross estate
value:

Less debts and
mortgages:

**Net estate
value:**

