



**PLAN FOR THE INEVITABLE – A CHECKLIST TO GET STARTED
(EASY AS A-B-C-D)**

A) Make an inventory

- 1) Property ownership
- 2) List of assets
 - a. Bank accounts
 - b. Investments
 - i. Registered
 - ii. Non-registered
 - c. Electronic assets (websites, rewards, NFTs, cryptocurrency)
 - d. Life Insurance
 - e. Vehicles, boats, etc.
 - f. Items of value (monetary or sentimental)

Tip: For registered investments and life insurance, make sure you have a named beneficiary unless they are a minor.

Action Item: If you are unsure about the beneficiary, don't leave it to chance: check by calling.

- 3) List of debts
 - a. Who do you owe money to?
 - i. Secured debts
 - ii. Unsecured debts
 - iii. Loans
 - b. Who owes money to you?
 - c. Have you co-signed with someone else?
 - d. Are you on title to somebody's else's property?
 - e. Are you bound by an agreement? (shareholder agreement, separation agreement, etc.)

B) Things to consider:

Executor:

Primary: _____

Secondary: _____

Third: _____

Have you spoken to them: Yes ___ No ___ [You should speak to them about the role]

Tip: Your executor should be a resident of Ontario due to court requirements.



Who would benefit under your will:

Primary Plan:

Personal effects: _____

Property: _____

Monetary assets: _____

Secondary Plan (What happens if that/those individual(s) pass away?):

Common disaster clause ("clause of last resort")

Do you want to benefit any charities: Yes ___ No ___

If yes, which ones: _____

Guardian for your minor children (if you have children under 16):

Primary: _____

Secondary: _____

Notes for discussion with your lawyer:



C) Who would act for me if I was incapable?

Rank	Property	Personal Care
Primary:		
Secondary:		
Third:		

Do you want an organ donation clause? Yes ___ No ___ [If yes, please sign your donor card so it appears on your health card]

Do I want a heroic measures clause? Yes ___ No ___

Do I have any other specific requests for my end of life wishes? Yes ___ No ___

D) Who should be advised on my death?

Friends: (make a list)

Family: (make a list)

Accountant: _____

Investment Manager: _____

Bank contact: _____

Mortgage broker: _____

Insurance broker: _____

Lawyer: _____

Doctor: _____

Call Marc Ouimet-McPherson at 343-888-8913 or email at marc@ottawa.law to start your estate plan. He also practices in real estate law, estates, and corporate/business law. The entire estate planning process may be in person or over Zoom, including signing the documents.

More details on the process and pricing are available here: willsfromhome.ca

