

New Client Information Form

Dwayne Pommer Law

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578 Central Street East, Prince George, BC, V2M 3B7

(We are located at the corner of 5th & Central, across highway 97 from Save-on-Foods and just north of Tim Hortons.
We share office space with Raymond James, look for their big blue and white "Raymond James" sign.)

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- We would appreciate it if you would complete the following form to assist us with serving you.
 - We have also prepared a Guide for Executors and a Guide for Administrators you can download and review prior to our meeting.
 - One of your tasks as Executor is to prepare a list of all of the deceased's assets and debts. We have prepared an Asset & Liabilities Checklist to assist you with this task.
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Information about the Executor (Probate) or Applicant for a Grant of Letters of Administration

- If there is more than one Executor/Administrator applying, please provide the following information for each Executor/Administrator (make an extra copy of this form or attach a sheet with the requested information).

Please bring a piece of picture ID (driver's license, passport, etc.) as we are required to make a copy.

Your current full legal name: _____

Name on your birth certificate (if different): _____

Mailing address: _____

Location of home (if different): _____

Home phone: _____ Work/Cell/Alt Phone: _____

email address: _____

Your date of birth: _____ Citizenship (if other than Canadian): _____

Your occupation: _____ Your Social Insurance Number: _____

Your relationship to the deceased (spouse, child, friend, etc.): _____

How did you hear about our firm? _____

Information about the Deceased

Name (as listed on death certificate): _____

Name on birth certificate (if different): _____

Any other names deceased used or owned assets in: _____

Mailing address: _____

Date of birth: _____ Place of birth: _____

Date of death: _____ Place of death: _____

Age at death: _____ Cause of death: _____

Citizenship (if other than Canadian): _____ Social Insurance Number: _____

Occupation: _____ Employer: _____

Please bring originals of the following documents to our first meeting:

- Will and any Codicil (will amending document) - if any
- Death Certificate
- Deceased's Birth Certificate
- One piece of the Deceased's picture ID (Driver's License, Passport, etc)
- one piece of picture ID for yourself

Information about the Deceased's next of kin

Wife/Husband

If the deceased was legally married or widowed, please provide the following information:

Wife/Husband name: _____ Age: _____

Address: _____

Year of marriage: _____ If the Wife/Husband predeceased provide the year of death: _____

If the deceased was separated as of the date of death but still legally married, provide the year of separation _____

Common Law Spouse

If the deceased was not legally married as of the date of death but had a common law spouse, please provide the following information:

Spouse name: _____ Age: _____

Address: _____

Year of first cohabitation: _____ If the spouse predeceased provide the year of death: _____

If the deceased was separated as of the date, provide the year of separation _____

Please provide some information about any former spouses

Children/Grandchildren

If the deceased had any children (including deceased or estranged) provide the following information for each child on a separate sheet of paper (make note of any child adopted in or out):

- Name
- Address
- Age (and date of birth and name of legal guardian if the child is currently younger than 19 years old)
- If the child is deceased provide the year of death and let us know whether the deceased child had any children of his or her own (provide names, ages and addresses of children of a deceased child).

Parents and Siblings

If the deceased did not have a wife/husband or spouse and did not have any children, grandchildren, etc. please provide the names and addresses of the deceased's parents and siblings. Include the names of any deceased parent and siblings and their year of death.

Information about the Beneficiaries of the Will (If there is a Will)

If not included above, provide the name, address and age of each beneficiary named in the Will. If any beneficiary is younger than 19 years old, provide their date of birth and the name of their legal guardian.