

New Will Client - Married or Common Law Couple

Dwayne Pommer Law

250-564-5300

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.
 - Your appointment will include a discussion of your assets. Please consider your assets and debts before hand. We don't need specific details such as account numbers just a general understanding of what you have.
 - Your Will needs to appoint an Executor (also known as Trustee) to look after your estate. We will discuss this with you at the meeting. However, before hand you should think about potential candidates for the job.
 - If you have young children, your Will also needs to appoint a Guardian to look after them. We will discuss this with you at the meeting. However, before hand you should think about potential candidates for the job.
 - Please bring a piece of picture ID (driver's license, passport) as we are required to make a copy.
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Full legal name: _____

Occupation _____ Employer _____

Your date of birth _____ Your place of birth _____

Citizenship (if other than Canadian) _____

Full legal name (spouse): _____

Occupation _____ Employer _____

Your date of birth _____ Your place of birth _____

Citizenship (if other than Canadian) _____

Mailing address: _____

Location of home (if different): _____

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

email address: _____

How did you hear about our firm? _____

What is your marital status? (Please check the appropriate response and provide the information requested)

Legally Married - Year _____ City _____

In a Common Law relationship – We have been living together approximately _____ years

Have either of you been previously married or in a long term common law relationship? YES NO

If so, please provide some basic information below (name of previous spouse, whether your previous spouse died or you separated/divorced, whether you are still legally married). We will discuss this at our appointment, you don't need to provide full details on this form.

Do either of you have any children from a prior relationship? YES NO

If so, please provide some basic information below (name of child, current age, does your child live with you, name of child's other parent ,whether other parent is living). We will discuss this at our appointment, you don't need to provide full details on this form.

If you have any children, please provide the following information (attach an extra sheet if you need more space)

Name (please provide current full legal name)	Parents* "Both" or Parent Name	City child lives in	Age	Marital Status	Number of children (your grandchildren)

* Parents. In the table above indicated for each child whether the child is the child of "both" of you or just one of you. If the child is the child of just one of you write your first name in the "Parents" box.

Do any of your children have any disabilities? YES NO

If so, please provide some basic information below. We will discuss this at our appointment, you don't need to provide full details on this form.

Do you have any children who have died? YES NO

If so, please list them above and indicate that they have died and provide the year of death and age they were when they died.
