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Change of Will and Power of Attorney Client Questionnaire

1. Name :

2. Address :

Phone No :

Email :

3. Date of original Will :

4. Which clauses in original Will need to be changed?

5. What is the change?

6. Why are these changes being made?



7. Where will you Store your Original Will? Please see my article on “Safekeeping and Retrieval of Wills and Powers of Attorney”.

8. Are there any changes required to the Powers of Attorney? If yes, please detail changes required below:

9. Would you like us to send letters to your attorneys/executors advising them of their positions and responsibilities if you have appointed new attorneys/executors? ~~Yes~~ • ~~Yes~~ []
If yes, please provide email addresses of your attorneys/executors.

10. Have there been any major changes in your life since you signed your last Will such as getting married, living common law, becoming separated or getting divorced? Please read my article on “Reviewing Your Will and Powers of Attorney”.



11. Has there been any material change in your financial situation since you signed your last Will?

12. Did you change the ownership of any of your assets since you signed your last Will?

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