

Mirsky • Pascoe

BARRISTERS SOLICITORS & NOTARIES

ADMINISTRATION OF ESTATES RETAINER

1. The undersigned retain Lawrence Pascoe to advise on all legal matters related to the administration of this estate, and to complete the tasks required to administer the estate as set out in the Administration of Estates Tasks List.
2. It is understood that Lawrence Pascoe is not responsible for any tax planning regarding the estate, nor for filing any of the deceased personal or estate tax returns.
3. It is understood that the undersigned are specifically responsible for these tasks in addition to those set out in the Administration of Estates Tasks List.
 - a. Making the funeral and burial arrangements
 - b. Determining the identity of and locating the beneficiaries of the estate and providing all information to complete an application for a Certificate of Appointment if necessary.
 - c. Determining the value and providing documentary proof of each asset and debt of the estate within a reasonable time.
 - d. Opening an estate bank account and keeping detailed records of all estate transactions.
 - e. Retaining a qualified person to complete all necessary tax returns for the deceased and the estate.
4. It is specifically understood that if a Certificate of Appointment is obtained that the undersigned must by law file the Ontario Estate Information Return within 90 days of issuing the Certificate of Appointment (Probate). The undersigned as Executor(s) are responsible and liable for the statements and values reported to the court.
5. Lawrence Pascoe will be compensated on a task basis as set out in the Administration of Estates Tasks List. It is further agreed that he will also be compensated if additional time is expended by either himself or his assistant to complete said tasks due to unforeseen events, or if additional tasks are added.
6. Though the estate is primarily liable for Lawrence Pascoe's fees, the undersigned acknowledges that the undersigned may be called upon to pay Lawrence Pascoe's fees in advance should the estate cannot do so on a timely or final basis. The undersigned therefore agrees to provide a credit authorization at the time of the initial consultation.

DATED at Ottawa, Ontario, this _____ day of _____, 20_____

Client's Signature

Client's Signature