

**EXCERPTS FROM
YOU'VE WRITTEN A WILL... NOW WHAT?**

Paragraph 1...

Congratulations on completing your will! Your thoughtfulness and foresight will be much appreciated by those you love. Now it's time to do something similarly considerate for those who will carry out your wishes. It's time to write a "last letter," which will aid your executor in administering your estate and reduce costs if a professional executor or co-executor is used.

Paragraph 3...

Begin by stating clearly the scope and purpose of the document. If you intend to update it periodically as your circumstances and wishes change, indicate where the latest version can be found.

Sample Sections...

ASSETS

In this section, include detailed descriptions of the financial assets you will leave behind, including such items as pension funds, insurance policies, and real estate holdings that you may not have thought about for years.

Various Categories of Items and Descriptions are listed here...an example follows:

Debts and loans. Describe fully any outstanding debts you owe, including interest rate, payment schedule and any special arrangements. If you have no debts, say so. Is any money owed to you by others? Include information about these loans and any advice you may have about how to collect them.

ESTATE ADMINISTRATION

This section should describe the persons and other sources of information that will be vital to the settlement of your estate in an expeditious and faithful manner.

FUNERAL AND BURIAL

Many people make advance arrangements for their last rites and for the disposition of their remains, whether by burial, cremation or donation to medical science. If you have made such plans, mention them in your letter and be sure to note whether any advance

payment has been made toward the cost of your funeral and burial. Provide the name of the funeral home and add any further requests or suggestions you may have.

Summary Paragraph...

WHEN YOU COMPLETE YOUR LETTER be sure to date and sign it. You may wish to have it witnessed and to give a copy to your executor, spouse, child or a close friend. On the other hand, if you expect to change the letter from time to time, you may prefer to keep its contents private. In that case, inform selected persons that the letter exists and where to find it.

[sidebar or box]

LEAVING A LEGACY TO THE COMMUNITY

Charitable bequests are an important way Canadians make lasting contributions to their communities. While most people necessarily think of family and friends first when planning their estates, many also include support for institutions that have been vital parts of their lives.

It is important to provide the exact name of any charity you designate as beneficiary so your gift can be transmitted correctly. For our organization, the proper designation is **[Full Name of Charity]**.

The confidentiality of all bequest provisions is maintained. If your completed will does not include a charitable bequest, you might consider adding one through a codicil.

FOR MORE INFORMATION

We invite you to write to us for a free booklet, _____. We would be happy to meet with you or your financial or legal advisor about a gift to **[Charity]**. Please write to _____ or telephone _____.

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