

Wills & Estates Intake Form

Instructions

Please complete the form below and provide it to the lawyer when you contact them. Please note that they will confirm whether a solicitor-client relationship has been created and provide you with an agreement. You may need to provide them additional information as well as showing them your government ID virtually via video call and providing them with scanned copies of the front and back as per legislation and law society/state bar rules.

Personal Information

Legal Name		Street Address, City, Province/State and Postal Code/Zip	
Telephone		Fax	
Office Email Address		Web Site	
Drivers Licence No.		Passport No.	

Other Info

Proof of front line healthcare worker status

Existing Wills

Marital Status and legal names of spouse (and prior spouses)

Children (names, citizenship and ages)

Other

Other

Executor(s)

Signature

Signature of the Person Submitting this Form

Name

Name of the Person Submitting this Form (print)