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## **Wills Package Information**

Attached is our wills questionnaire, which is used to collect information that aids us in drafting our will packages. The wills package consists of three separate documents, and while any could be executed on its own, it has always been our advice to have all three done at once, in conjunction with one another. These documents are a will, a personal directive and an enduring power of attorney.

### ***Will***

A will is a legal declaration made in writing which names one or more person to manage your estate and also provides for the transfer of property upon death.

We advise keeping a will as simple as possible. Often, people who are married or have a common-law partner, will their entire estate to such spouse or common-law partner. If the spouse or common-law partner predeceases them, they often will the estate to the children, *per stirpes*.

*Per stirpes* is a Latin term that translates to “by branch” and means that each branch of the family will receive an equal share of the estate. As an example, there were two children who should receive half of the estate each, but one is deceased and the deceased child had two children. Half of the estate would go to the surviving child and one quarter of the estate would go to each of the deceased child’s children.

### ***Personal Directive***

A personal directive is a set of written instructions that a person gives laying out what actions should be taken regarding their health, if they are no longer able to make decisions due to illness or incapacity. This directive appoints an agent to make these decisions on your behalf.

### ***Enduring Power of Attorney***

An enduring power of attorney provides legal authorization to an attorney to act on your behalf in legal or business matters. These matters may include the disposition of property, dealing with finances, signing documents and making purchases on your behalf. This document does not grant the attorney the power to make substantial or unusual gifts, or make decisions about personal care and welfare.

It is important to know that there are a number of technical provisions that must be adhered to in the execution of these documents to ensure that they are valid and legal.