

File No.: _____



LAUGHLIN J. CAMPBELL LL.B.
NICHOLAS C. BADER LL.B.
KAS MARYNICK LL.B.
JESSIE CHUI LL.B.
SOFIA DHARAMSHI LL.B.
J. BRANDON O'RIORDAN LL.B.
DILMINI WALALIYADDE LL.B.

1-2624 Dunwin Drive
Mississauga, ON L5L 3T5

Tel: 905-828-2247
Fax: 905-828-4311

INFORMATION REQUIRED TO PREPARE YOUR WILL

DATE: 11-Nov-2014

How did you hear about our firm? Referral

A. FAMILY AND PERSONAL INFORMATION

1. FAMILY DETAILS

Full Name

David Bradley Chase

First

Middle

Last (Maiden or other name used)

Address

2010 Silverberry Cr.

Street/Rural Route

Mississauga

City/Township

ON

Province

L5J1C9

Postal Code

Telephone 416-476-3701

Home

Office

Date of Birth 5-Nov-1972 S.I.N. 500 224 753

Occupation Account Manager Present Employer Microsoft

Marital Status Separated Place of Permanent Residence Canada

Date of Marriage 15-Jun-2008 Place of Marriage Orangeville, ON
(if applicable) (if applicable)

Date of Divorce _____ Place of Divorce _____

Full Name of Spouse

Brandy VanGerven

First

Middle

Last (Maiden or other name used)

Address of Spouse (if different from above)

46 Fife St.Grand Valley

Street/Rural Route

City/Township

ON

Province

Postal Code

Spouse Date of Birth 18-Dec-1976 S.I.N. of Spouse _____Occupation of Spouse Secretary Present Employer Orway MineralsAre you presently living with your Spouse? No

Date of Divorce of Spouse from previous marriage (if applicable) _____ Place of Divorce of Spouse from previous marriage _____

If not married, are you preparing your will in contemplation of Marriage? _____

If yes, name of intended Spouse _____

Children and/or relatives to inherit under will:

NAME	RELATIONSHIP	DATE OF BIRTH	ADDRESS
<u>Karlee Chase</u>	<u>Daughter</u>	<u>15-Jun-2006</u>	<u>46 Fife St., Grand Valley, ON</u>

2. PROFESSIONALS INVOLVED WITH YOUR FAMILY

Minister _____

Full Name	Address

Lawyer _____

Full Name	Address

Accountant _____

Full Name	Address

Insurance Agent _____

Full Name

Address

Financial Advisor Ryan Quinn

8500 Leslie Street, Thornhill, Ontario, L3T 7M8

Full Name

Address

Broker

Full Name

Address

Family Doctor

Full Name

Address

3. LOCATION OF IMPORTANT DOCUMENTS

Current Will

Life Insurance Policy Sun Life Financial 005993 c/o Microsoft Canada

Funeral or Burial Property Deed

Securities and Property Deeds BMO Nebitt Burns 456-05183 - All RRSP, RESP

House deed in filing cabinet

Automobile Registration In glove box

Marriage Certificate

Tax Records In home filing cabinet

Birth Certificate In office

Passport In office, with birth certificate

Safety Deposit Box (Location and No.)

List of Credit Card Nos. Mastercard 5268067211265090, Visa 4500030117206155

Trust Agreements

Business Agreements

Other

B. ASSET INVENTORY

1. REAL ESTATE (indicate which is principal residence)

Location & Type

Sole/Joint
Ownership

Current Value
(do not deduct
Mortgage)

Husband's
Share

Wife's
Share

2010 Silverberry Cr, Mississauga, ON, L5J1C9

\$ 420,000

\$ _____

\$ _____

2. HOUSEHOLD GOODS AND FURNITURE

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

3. HEIRLOOMS, ARTWORK, JEWELLERY AND OTHER COLLECTIONS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

4. AUTOMOBILES, BOATS AND RECREATION VEHICLES

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
<u>Mazda Tribute</u>		\$ <u>9,000</u>	\$ _____	\$ _____

5. FARM MACHINERY, TOOLS, LIVESTOCK AND QUOTAS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

6. CASH DEPOSITS

Bank	Account	Sole/Joint Ownership	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

7. STOCKS (Publicly Traded)

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

8. BONDS AND INVESTMENT CERTIFICATES

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

9. MONEY INVESTED IN MORTGAGES AND PERSONAL LOANS

Description:	Sole/Joint Ownership	Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

10. INSURANCE

Name of Company	Type	Beneficiary	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

11. R.R.S.P.'S AND COMPANY PENSION PLANS

Name of Company	Type	Beneficiary (if any)	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

12. BUSINESS & PARTNERSHIP INTERESTS

Name & Nature	Sole Proprietorship or Partnership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

Details of Shareholders and/or Partnership Agreements: _____

13. TRUST FUNDS THAT YOU ARE BENEFICIARY OF

Source	Purpose	Your Rights to Trust Fund	Husband's Share	Wife's Share
_____			\$ _____	\$ _____

14. TRUST FUNDS THAT YOU ARE TRUSTEE FOR

Nature of Trust	Beneficiary	Description of Property

_____		\$ _____

_____		\$ _____

These funds are not included in the value of your estate.

15. OTHER ASSETS

Description:	Sole/Joint Ownership	Current Value	Husband's Share	Wife's Share
_____		\$ _____	\$ _____	\$ _____

TOTAL VALUE OF ASSETS:

\$ _____ \$ _____

16. APPROXIMATE DEBTS & MORTGAGES OUTSTANDING

Nature of Debt	Name & Address	Joint/Sole	Amount	Husband's Share	Wife's Share
_____			\$ _____	\$ _____	\$ _____

TOTAL AMOUNT OF DEBTS: \$ _____ \$ _____

TOTAL NET VALUE OF ESTATE: \$ _____ \$ _____

17. OTHER INFORMATION

Details of domestic contracts _____

Details of support obligations, either moral or legal _____

Details of any relevant personal situations (ie, disabled, concerns re: spending habits of family)

(NOTE: REMAINDER OF QUESTIONNAIRE TO BE COMPLETED WITH LAWYER)

C. NAMING OF EXECUTOR/EXECUTRIX

Do you want your spouse as executor/executrix if she/he survives? _____

If not, who is to act?

NAME	ADDRESS	RELATIONSHIP (IF ANY)
_____	_____	_____
_____	_____	_____

Who is to act as alternative executor(s) or executrix(s)?

(HUSBAND)	(WIFE)
NAME: _____	NAME: _____
ADDRESS: _____	ADDRESS: _____
RELATIONSHIP (IF ANY) _____	RELATIONSHIP (IF ANY) _____

In the case of two executor(s) or executrix(s) is one to have the deciding vote? _____

If so, who? _____

In the case of three or more executor(s) or executrix(s), is a majority decision binding? _____

Are there any special instructions to the executor(s) or executrix(s), such as physical custody of assets, etc?

D. NAMING OF GUARDIAN FOR CHILDREN

Names of Guardian(s):

First	Middle	Last	Address
-------	--------	------	---------

First	Middle	Last	Address
-------	--------	------	---------

Alternative Guardian(s):

First	Middle	Last	Address
-------	--------	------	---------

First	Middle	Last	Address
-------	--------	------	---------

Name of Guardian(s) of children's Estate if different from above:

First	Middle	Last	Address
-------	--------	------	---------

E. FUNERAL INSTRUCTIONS

Any funeral instructions included in your will should be conveyed to your executor or executrix now.

Instructions from Spouse, if different from above.

F. DISTRIBUTION OF ESTATE

1. PERSONAL EFFECTS (i.e. jewellery, clothing, keepsakes, etc.)

If Spouse survives, are all personal effects to go to Him/Her? _____

If answer is NO, or Spouse does not survive for thirty days, how is personal property to be distributed?

- 1) To living Children as they may agree _____
- 2) In accordance with a non-binding memorandum filed with your will _____
- 3) In accordance with a binding memorandum (specific gift within) accompanying your will

- 4) To estate trustee with request that personal property be distributed according to his/her discretion _____
- 5) Other (please specify details) _____
Instructions for Spouse, if different _____

2. LEGACIES (MONEY) and/or SPECIFIC GIFTS (including Real Property)

Name of Person/Organization As beneficiary	Money/Property to be given	Alternative Beneficiary
---	-------------------------------	----------------------------

Instructions from Spouse, if different from above _____

3. DISPOSITION OF INSURANCE, R.R.S.P., R.H.O.S.P. etc. (if different from instructions in policies)

Policy or Plan: _____ Beneficiary: _____

4. DISPOSITION OF BUSINESS OR PARTNERSHIP INTEREST

Is there need for specific property to be held in trust, such as a house? _____

If so, then specify the following:

Trust Property _____

Beneficiary _____

Cost of Care of Trust Property _____

Termination of Trust _____

Instructions from Spouse, if different from above _____

5. RESIDUE

a) If married (with or without children) and Spouse survives for a minimum of 30 days, then:

- all to Spouse? _____

- If not, then:

_____ % to surviving Spouse _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

b) If predeceased by Spouse but survived by children for a minimum of 30 days:

_____ Equally between each child _____

_____ % to each surviving child _____

_____ % to other _____

_____ % to charities _____

c) If predeceased by Spouse and not survived by any children or grandchildren for a minimum of 30 days:

_____ % to parents _____

_____ % to parents of Spouse _____

_____ % to siblings _____

_____ % to charities _____

d) If single:

_____ % to parents _____

_____ % to siblings _____

_____ % to other _____

_____ % to charities _____

e) When will minor children receive their inheritance?

_____ division at death with each receiving share at age _____

_____ hold as one trust until youngest reaches the age of _____

_____ hold as one trust until the oldest reaches the age of _____

- f) If a child should die before becoming entitled to his or her share, what is to happen to that child's share of the residue of the estate? Consideration should be given to distributing such child's share amongst the Spouse, children and siblings of the dead child as the case may be.

- g) Instructions from Spouse, if different from above _____

6. ADDITIONAL INSTRUCTIONS IN WILL

Do you wish your executor to have power to sell items of the residue as well as the right to temporarily postpone the sale of the saleable assets? _____

Do you desire any capital and income taxes, plus Succession Duties (if applicable) to be paid out of residue, thereby leaving legacies and specific gifts free of such impositions? _____

Do you wish to exclude illegitimate children of either yourself or your offspring as beneficiaries of your estate:

7. POWER OF ATTORNEY DURING LIFETIME

Is a Power of Attorney for Property to be prepared? _____

Who is to be the attorney and alternate attorneys?

Husband

Wife

1. _____ 1. _____

2. _____ 2. _____

3. _____ 3. _____

Do you wish the non-heroic clause?

Husband _____ Wife _____

Additional information/comments:

CAMPBELL BADER LLP
PRIVACY STATEMENT

As of January 1st, 2004, all private companies engaged in commercial activities must comply with the Personal Information Protection & Electronic Documents Act ("the Act"), unless federal cabinet has exempted the organization because it is subject to "substantially similar" provincial legislation. Your information is also protected by solicitor-client privilege and the Rules of Professional Conduct governing lawyers in the Province of Ontario, which in most respects is a greater protection than that afforded under the Act.

***Campbell Bader LLP** is responsible for the personal information we collect, use, maintain and disclose. To ensure this accountability, we have developed a Privacy Policy (available upon request), and have provided training to our managers and support staff on how to properly implement our privacy policies and practices.*

We have asked you to fill out this form because collecting some of your personal information is required as part of our legal services to you. We may at times collect sensitive financial, family, and personal preference information from you, which is required in order to provide you advice and legal services. By providing such information you consent to the use of the information as outlined in the form and for the purposes of providing you with legal advice and services.

We will keep the personal information that you provide to us in this form completely confidential. We will not disclose your personal information provided in this form to any third party without your consent.

***Campbell Bader LLP** is committed to protecting your privacy and we take all reasonable precautions to ensure that your personal information is kept safe from loss, unauthorized access, modification, or disclosure. We operate on a secure data network protected by an industry standard firewall and password protected systems. Our security and privacy policies are periodically reviewed and enhanced, and only authorized individuals at our firm have access to your personal information.*

*If you have any questions relating to the collection, use, disclosure, and/or accuracy of your personal information provided by you and held by **Campbell Bader LLP**, please contact our Privacy Officer at jbm@campbelllawyers.net.*