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The Anatomy of a Basic Will

Presented to Brain Injury Society of Toronto
May 20, 2020

Presenter



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Daniel is a former former tax and estate planning lawyer who started Epilogue with the goal of giving Canadians access to the tools and resources they need to create their own, high-quality estate planning documents.

Disclaimer

The content of this presentation does not constitute legal, accounting, tax or other professional advice. The content of this presentation is provided for informational purposes only.

Overview

The Basics

- Executor/trustee
- Specific bequests
- Residue
- Administrative

Minor Children

- Guardians
- Trusts

The Basics - Executor/Trustee

Preliminary

- Funeral
- Review Will

Initial Admin

- Cancel accounts
- Estate account
- Terminal return

Assets & Probate

- Secure assets
- Determine debts
- Valuations
- Probate application

Ongoing Admin

- Distribute assets
- Establish and maintain trusts
- Trustee accounts

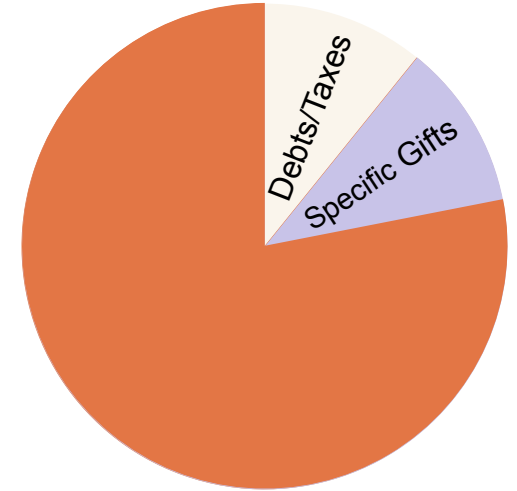
The Basics - Specific Gifts

Types

- Cash
- Property

Beneficiaries

- Individual
- Charity
- Classes



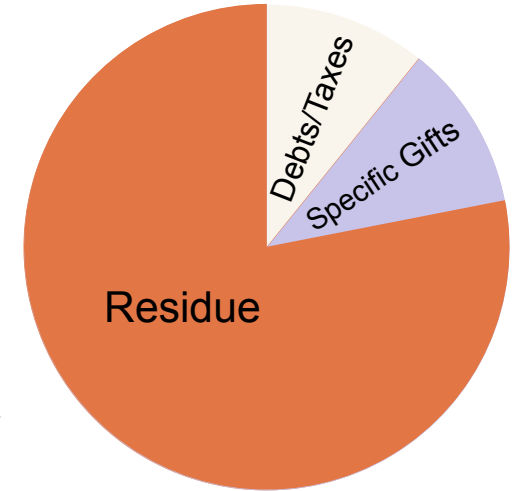
The Basics - Residue

Spouse

- Outright
- Trust

Children

- Outright
- Trust
- *among issue per stirpes*



Avoid possibility of intestacy

The Basics - Administrative

Powers

- Investments
- Borrowing
- Real estate
- Business & corporate

Compensation

- Pre-taking
- Fixed amount
- Hourly or formula

Digital Assets

Definitions

Minor Children

Guardians

- Effective for 90 days

Trusts

- Discretionary / mandatory distributions
- Income / capital
- Staged distributions



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Questions?