

# WILL AND POWERS OF ATTORNEY PACKET

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## Introduction

Thank you for requesting my Will Packet. Enclosed are five articles that I have written entitled [Reasons for Making a Will](#) , [Continuing Powers of Attorney for Property](#) , [Powers of Attorney for Personal Care](#) , [Reviewing Your Will](#) , and [Will, Power of Attorney and Estate Definitions](#) . These articles are not substitutes for legal advice but are for general information. It is advisable but not necessary that you read these articles prior to your appointment with me. I would ask you to complete the [Will and Power of Attorney Asset Information Form](#) before a consultation. This form also serves as a record that may help your executor in administering your estate. Of course, all information regarding your assets is strictly confidential.

My Powers of Attorney reflects the current law. The Ontario Government has legislated law that allows for a Power of Attorney for Personal Care which may have a provision more commonly known as a Living Will. Enclosed is my [Continuing Power of Attorney for Property Questionnaire](#) and my [Personal Care Power of Attorney Questionnaire](#) . You should complete them as best you can and I will finalize it at your consultation, or over the telephone if you are just doing Powers of Attorney and not Wills.

Enclosed is my [Fee Schedule](#) and a [Procedure explanation](#) , as well as my [Will Questionnaire](#) . As well, I am attaching my [Resume](#) and [My Service Principles — The Pascoe Difference](#) so that you have a better idea of who I am and my experience. I have been practising since 1977. I restrict my practice to the areas of law commonly used by the average person — Wills and Estates, Family Law and some residential real estate. I try to be unique, innovative and client-oriented. This packet is an illustration of all three of those qualities, as is my **Will and Power of Attorney Manual** with other article memos and checklists. The Will Manual is explained in greater detail in my Procedure memo.

I encourage my clients to give me their opinions. I have therefore initiated a [Client Survey Contest](#) , which is enclosed, so as to obtain more client feedback. Even if you do not become a client, I invite you to complete the [Will and Power of Attorney Packet Survey](#) and the [Choosing a Lawyer Survey](#) and enter the contest. If I can be of further assistance, please call me or my staff for an appointment.

My experience is that many people put off making Wills and Powers of Attorneys. I believe that is a mistake. Having updated Wills and Powers of Attorney will give you “peace of mind” knowing that your personal affairs are in order for your benefit and your family's benefit.

— LAWRENCE S. PASCOE

## Reasons for Making a Will

A will allows one to decide upon one's death "who" gets "what assets", "when", and "who" looks after the estate and any trusts. A will may also allow one to state his or her preference as to who should have custody of one's child, though it is not binding on the court. One may also express his or her wish as to how he or she wishes to be buried, but this is not binding upon the executor.

Without a will, all of those decisions are governed by Ontario's Succession Law Reform Act. The main reason for having a will is therefore to allow one to make these decisions rather than letting the government's statute dictate them. Moreover, without a will there may also be administrative problems, extra expenses and possible lawsuits by dependents or spouses who did not inherit as much of the estate as they would have under the dependant relief provisions of the Succession Law Reform Act or on equalization of assets claimed under the Family Law Act.

Often what the Succession Law Reform Act dictates is not what one would have wanted or what is best for the estate and the beneficiaries (persons who inherit the estate). This article will explore briefly the main decisions that are expressed in a will, what decisions are made by the Succession Law Reform Act in the absence of a will, and why the latter decisions may not be the best in many circumstances.

- **Designating Beneficiaries:** The Succession Law Reform Act Part II states who gets what portion of the estate if there is no will. Contrary to popular belief, it does not all necessarily go to one's spouse. When there are children involved, the spouse receives the first \$200,000.00 and the remainder is divided among the spouse and the children in proportions that depend on the number of children. If one dies without a spouse and without children or grandchildren, the parents are the beneficiaries. In this latter instance, which might occur because of an accident involving the whole family, one's wishes should be expressed in a will as most often a person desires that other relatives, such as brothers and sisters become the beneficiaries as well as the parents.
- **Designating Specific Assets:** If one dies without a will, the assets are usually all sold and the beneficiaries obtain their share of the estate in cash. A will allows one to designate specific assets to certain people.
- **Child Beneficiaries:** It is in the case of child beneficiaries that a will is most necessary. Without a will naming a trustee to look after the children's money until they are a certain age, the Official Guardian's office in Toronto becomes the trustee. The Official Guardian as trustee must give the children their share outright at age eighteen. Some people do not feel that a child is sufficiently responsible at age 18 to manage a large amount of money (and with today's death benefits and insurance policies, it could be a large sum). By having a will, a parent can decide at what age the child can take control of his or her bequest such as at age 21, 23,

25 or even 30. Until that time, the trustee of a will still has flexibility to give the child capital from his bequest if he or she really needs it. The Official Guardian is a bureaucrat who does not have as much time to monitor personally the needs of the child and therefore there may be a time lag between requesting money and receiving it. Also, an appointed trustee may do better than the Official Guardian at investing the money. The Official Guardian will almost always turn all the assets into cash and invest them at the going interest rate. It may be that certain assets such as rental accommodations should be retained as the rate of return may be better.

- **Administration:** A person by a will decides who administers the estate. The court, if there is no will, would appoint an "Estate Trustee", a person or persons who are usually the closest relatives to the person who died. The person or persons appointed may not be the people one would have chosen. In a will, one might have appointed the most responsible child or a friend but the court, if there is no will, might appoint another person. By his will, a person can and usually does give more powers to the estate trustee (formerly called the executor) than the law does to a court appointed trustee. This may be important if the assets need to be managed (such as rental property or a business) rather than sold.
- **Custodians:** The Children's Law Reform Act now allows one to appoint by will the custodian of one's minor children. This appointment is only valid for ninety days from the date of death, but an appointment can be of great benefit as upon the death of a parent, for the initial ninety day period, there would be no argument as to who should look after the children, as the decision will have been made. It will reduce greatly the emotional stress among the relatives and children if they do not have to argue and discuss where the children should reside. The final decision as to the custodian which will be made by the court will be easier, and probably less contested if the will states the parent's preference.
- **Burial Arrangements:** One's wishes as to his or her mode of burial is often expressed in one's will, though legally the wishes are not binding on the executor. If one is eccentric and wants his ashes spread over the North Pole or wants a great party at his funeral, one should carefully choose an executor who will carry out these wishes.
- **Administration Problems:** Even if the Succession Law Reform Act provides the same beneficiaries, age of distribution, estate trustee and the court appoints the custodian that one would have chosen, there may be extra administration costs when one dies without a will especially in smaller estates. In a small estate, banks and other institutions will give the executor money or assets in their possession upon obtaining a copy of the will. They will not make an executor go to the expense of probating the will (probate is a court application to prove the will). However, if there is no will, a bank or institution would most likely require that the person administering the estate apply to the court for a Certificate of Appointment of Estate Trustee which even in small estates is costly. A will takes effect on death and even before the will is probated by the court. The executor therefore can deal and manage the assets right away if that is necessary such as in order to run a small business. However, an administrator has no authority until the court appoints him. This time delay can cause problems if there are decisions that must

be made immediately.

- **Estate Planning:** The making of a will is the appropriate time to put one's financial affairs in order and explore all aspects of estate planning. An important element of that estate planning would be to ensure that probate fees are minimized. Through estate planning, one might discover that more life insurance is needed to properly take care of loved ones, keeping in mind that substantial taxes may be payable at the time of death which may erode the value of the estate's assets. If assets are not liquid, life insurance proceeds may also assist the family until the estate has been administered. It may also be the time one gives both a Continuing Power of Attorney for Property and a Personal Care Power of Attorney to one's spouse in case of illness or incompetence. The Family Law Act allows a spouse to sue an estate for an equalization of assets as though the couple separated. This possibility along with the possibility of dependent spouses or children pursuant to the Succession Law Reform Act suing the estate must be taken into account when drafting the will. Besides careful drafting of the will to deal with the problem, it might necessitate a marriage contract to obtain the objectives desired.

Everyone's situation is unique and may be more or less complicated than the examples given in this article. It is suggested that one seek a lawyer's advice to discuss one's own personal situation.

\*This article can only provide a general overview of a legal topic. Readers should consult a lawyer and not simply act on the information provided in this article.

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## **Continuing Powers of Attorney for Property**

### WHAT IS A CONTINUING POWER OF ATTORNEY FOR PROPERTY?

A Continuing Power of Attorney for Property (referred to in this article as CPAP) allows a person (the grantor) to give to another person (the attorney), the power to do anything on the grantor's behalf with respect to the financial matters of the grantor, whether the grantor is incapacitated or not. The only exception is that the attorney cannot make a new Will. Though the term attorney implies a lawyer, a lawyer need not be the attorney. The granting of the CPAP does not prevent the grantor from continuing to act for himself or herself.

### WHY HAVE A CPAP?

The main reason to have a CPAP is to ensure that upon the grantor's incapacity, the person the grantor appointed as the attorney, would act on behalf of the grantor, otherwise the Ontario Government will in effect become the attorney. A family member may be appointed to take over from the Government but that is after time and money on legal fees are spent and the family member appointed may not be the one the grantor would have chosen as his/her attorney.

### WHO MAY MAKE A CPAP?

A person must be over eighteen years of age to grant a CPAP. The Substitute Decisions Act, (hereafter referred to as the "Act") states a person is capable of giving this power of attorney if a number of criteria are met. Those criteria are the person: (a) knows what kind of property he or she has and the approximate value of it; (b) is aware of obligations owed to dependants; (c) knows the attorney will be able to do anything on the person's behalf in respect of assets, except make a Will and be subject to exceptions in the power of attorney; (d) knows the attorney is required to account; (e) knows the power of attorney may be revoked by the grantor; (f) appreciates that unless the attorney manages the property prudently its value may decline; (g) appreciates the possibility that the attorney could misuse the authority given to him or her. The test of granting a power of attorney is therefore not related to the ability to manage one's financial affairs but in some regards a lesser test.

### WHAT DECISIONS HAVE TO BE MADE IN MAKING A CPAP?

(a) Choosing the Attorney: The only legal requirement is that the attorney be over eighteen years of age. It should be someone the grantor trusts. More than one attorney may be appointed, in which case the grantor must decide whether the attorneys must act together or may act individually. One is also allowed to appoint alternate attorneys in case the attorney appointed is not alive or unable to act as the attorney.

(b) Effective Date: The CPAP allows one to state when the CPAP comes into effect.

It is recommended (and the usual practice) that the CPAP comes into effect immediately on signing the PA. The other alternative under the Act is to state that the CPAP comes into effect when the grantor is incapable. The grantor may set out the test of capacity. If the grantor is worried that the attorney will use his or her powers before the incapacity of the grantor without the grantor's knowledge, in my opinion, there is not enough trust to appoint that attorney in the first place.

(c) Compensation: The CPAP may state if the attorney may take compensation for work performed and, if so, how much. The Government has a fee schedule for attorneys. In most cases a relative appointed to be the attorney will not take compensation, but if he or she is doing considerable work, then he or she should be compensated.

(d) Gifts, Loans and Charitable Donations: The Act allows for the attorney to make gifts and loans to friends and relatives and donations to charities. A gift or loan can only be made if there was intention shown by the grantor to make such a gift or loan prior to becoming incapacitated. It is therefore best to spell out in CPAP whether the grantor does or does not want gifts and loans to be made to friends and relatives and whether donations can be made to charities.

(e) Restrictions and Conditions: The CPAP may put any restrictions and conditions on the attorney's use of the CPAP. Such restrictions may relate to the type of investments the attorney can invest in or a request that certain assets be dealt with in specific ways.

#### WHAT ARE THE DUTIES OF THE ATTORNEY?

An attorney is to act honestly and diligently for the grantor's benefit. An attorney is to explain to the incapable person what the attorney does and is to encourage the incapable person's participation. There is also the important obligation to keep accounts of all financial transactions.

The attorney is obligated to make expenditures that are reasonable and necessary for the grantor's care and the care of the grantor's dependants and to others whom the grantor has a legal obligation.

#### WHAT FORM MUST THE CPAP BE IN?

There is no requirement that a specific form must be used, simply that the intention of the grantor must be clear. The CPAP must be in writing and signed in front of two witnesses. Certain people may not be a witness such as the attorney, the attorney's spouse or partner, the grantor's spouse or partner, a child of the grantor (which includes a non-blood related person who is treated as a child by the grantor), a person under eighteen years of age, nor anyone under personal or property guardianship.

There is no requirement that the CPAP be registered. There is no Government registry.

A lawyer does not need to draft the CPAP to make it valid, however, the lawyer generally is doing much more than drafting the CPAP. He or she would be providing advice as to how the CPAP operates.

#### WHEN IS A CPAP TERMINATED?

The CPAP is terminated when the grantor dies or when the grantor makes a new CPAP. The CPAP is terminated when the attorney dies, becomes incapacitated or resigns and there is no joint or alternate attorney.

#### FURTHER INFORMATION

The Ontario Government's web site at [www.attorneygeneral.gov.on.ca](http://www.attorneygeneral.gov.on.ca) has powers of attorney kits and further information.

## Powers of Attorney for Personal Care

### WHAT IS A POWER OF ATTORNEY FOR PERSONAL CARE?

A Power of Attorney for Personal Care (hereinafter referred to as PCPA), allows a person (the grantor) to give to another person (the attorney), the power to make personal and medical decisions if the grantor is mentally incapacitated. The PCPA can allow the grantor to direct (like a living Will) that life support systems not be used if there is no reasonable prospect of recovery.

### WHY HAVE A PCPA?

The PCPA allows one, in case of their incapacity, to appoint the person he or she wishes to make almost any decision of a personal nature that one would make if capable, such as decisions related to medical treatment, housing and food.

### WHO MAY MAKE A PCPA?

A person must be sixteen years of age to grant a PCPA. A person is capable of granting a PCPA if that person has the ability to understand that the proposed attorney has a genuine concern for the person's welfare and appreciates that the proposed attorney may need to make decisions for him or her. The test is not that the grantor is capable of personal care.

### WHAT DECISIONS HAVE TO BE MADE WHEN MAKING A PCPA?

(a) Choosing the Attorney: The only legal requirement is that the attorney be over eighteen years of age. It should be someone the grantor trusts. More than one attorney may be appointed. In that case the grantor must decide whether the attorneys must act together or may act individually. One is also allowed to appoint alternate attorneys in case the attorney appointed is not alive or unable to act as the attorney.

b) Living Will Clause: Rather than having a separate document the PCPA may be used to express one's wishes concerning the use of life support systems when there is no reasonable expectation of recovery from a severe disability.

c) Instructions, Conditions and Restrictions: The PCPA may have very detailed instructions as to one's personal care including specific directions as to medication and treatment.

### WHEN WILL THE PCPA COME INTO EFFECT?

The PCPA is different from the Continuing Power of Attorney for Property in that it can only be used during the time that the grantor is mentally incapable of making his or her own personal care decisions. The attorney decides whether the grantor is mentally incapable. A grantor can state that the attorney is required to get independent evidence before acting, such as a letter from a doctor. An attorney only makes the decisions that the grantor cannot make. Therefore, not all personal care decisions are made by the attorney and some should be

made by the grantor.

### WHAT ARE THE DUTIES OF AN ATTORNEY OF A PCPA?

An attorney must act diligently and in good faith. An attorney is to explain to the incapable person what the attorney does and to encourage participation by the incapable person, as well as participation by family and friends. An attorney should foster contact with family and friends and to meet with them. The attorney should follow the wishes of the incapable person that were expressed while capable.

### HOW IS THE ATTORNEY FOR THE PCPA COMPENSATED?

Unfortunately, there is no specific discussion in the Substitutes Decisions Act about compensating an attorney. The PCPA could set out compensation but it is not common to do so, though it can set out that the attorney is reimbursed for actual expenses.

### WHAT FORM MUST THE PCPA BE IN?

There is not a requirement that a specific form be used, simply that the intention of the grantor must be clear. The PCPA must be in writing and signed in front of two witnesses. Certain people may not be witnesses such as the attorney, the attorney's spouse or partner, the grantor's spouse or partner, a child of the grantor (which includes a non-blood related person who is treated as a child by the grantor), a person under eighteen years of age, nor anyone under personal or property guardianship.

There is no requirement that the PCPA be registered. There is no Government registry. A lawyer does not need to draft the PCPA to make it valid, however, the lawyer generally is doing much more than drafting the PCPA. He or she would be providing advice as to how the PCPA operates.

### WHEN IS A PCPA TERMINATED?

The PCPA is terminated when the grantor dies or when the grantor makes a new PCPA. The PCPA is terminated when the attorney dies, becomes incapacitated or resigns and there is no joint or alternate attorney.

### FURTHER INFORMATION

The Ontario Government's web site at [www.attorneygeneral.gov.on.ca](http://www.attorneygeneral.gov.on.ca) has powers of attorney kits and further information.

## Reviewing your Will

There are three reasons to review a Will to consider whether changes are necessary. First, the facts upon which the original Will were based have changed. Second, the law may have changed concerning one or more aspects of the Will. Third, because of one of the two previous reasons, changes may be required to any Power of Attorney provisions specified in the Will.

- **Factual Changes:** Since making the Will, children and or grandchildren may have been born who are not referred to in the original Will. Also, the children may now be old enough to be the executors of the Will and perhaps should replace the present executors.

If one is separated from a spouse but not yet divorced, even if there is a separation agreement or court order, the existing Will may still leave the spouse the estate. As that is not what is probably intended, a new Will is necessary because the parties are still married and the Will is still valid. If one has married since making a Will then there is no Will because a Will is automatically revoked on marriage. A new Will is therefore necessary, especially if there are children from a previous marriage who are to receive the major part of the estate. If one has divorced since making a Will then the first spouse is automatically removed from the Will. This is probably what one would desire but if not a new Will is needed.

There may be beneficiaries whom one no longer wishes to benefit. The named executors may have died or are no longer appropriate for the job. The same may be true for the persons named as custodians of minor children.

Lastly, the size and nature of the estate may be now such that a different executor such as a trust company is necessary. This need for a corporate executor may be because of the competency of the beneficiary. Also, one may now wish to add more beneficiaries such as favourite charities.

- **Changes in the Law:** The Ontario Family Law Act, which was passed in 1986, affects the drafting of Wills. A surviving spouse could sue the estate if she or he were not given in the Will the same amount of assets they could obtain in law upon a separation. It should be noted that life insurance and pension benefits would not be given to the spouse if he or she chose to sue the estate and therefore must be considered when deciding to assert a Family Law Act claim. Therefore, to avoid such litigation having a marriage contract, obtaining more life insurance or calculating the legislated amount required might be needed. In most cases where the surviving

spouse is the sole beneficiary there is no such problem but in most second marriage situations there may be a problem that should be corrected.

The Family Law Act specifically excludes from equalization of assets on marriage breakdown the income from inherited property if so stated in a Will. Therefore, all Wills should recite such a statement, so to somewhat help one's children if they later separate. Wills made prior to 1986 would not have such a statement.

Since the Succession Law Reform Act in 1979 the definition of children would include children who were born outside of wedlock. Therefore, if such children do exist and for some reason it is not intended that they inherit under the Will, then that intention must be made clear in the Will.

In the last few years there has been confusion as to the distribution of property that had been held in joint tenancy. It may not automatically go to the surviving joint tenant. It is therefore prudent in some situations where joint tenancies exist to state the rights of the surviving joint tenant.

- **Powers of Attorney:** Changes of facts or in the law might necessitate the change of the attorney appointed or terms of one's Power of Attorney. In 1995 the laws regarding Powers of Attorney have dramatically changed. (See my article on [Powers of Attorney](#).)

\*This article can only provide a general overview of a legal topic. Readers should consult a lawyer and not simply act on the information provided in this article.

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## Will, Power of Attorney and Estate Definitions

- **Administrator:** An administrator is a person appointed by the Court to administer the estate when there is no will, the will did not name an executor, an executor has died, or an executor is unwilling to act. A female administrator, is called the “administratrix” . This person is now technically called the “ Estate Trustee Without a Will” but the term administrator is still used.
- **Attorney:** The person appointed to look after the donor’s financial affairs in the case of a Continuing Power of Attorney for Property or the donor’s medical affairs in the case of a Power of Attorney for Personal Care. An attorney does not have to be a lawyer. **Beneficiary:** A person who receives a benefit or gift under a will, or a person for whose benefit a trust is created.
- **Certificate of Appointment of Estate Trustee with a Will:** The Court document, which includes a certified copy of the will, whereby the Court confirms the executor named in the Will is entitled to administer the estate. This document was previously called “ Letters Probate” .
- **Certificate of Appointment of Estate Trustee without a Will:** This Court document, confirms a person, formerly called an administrator, now called the estate trustee without a will, has the authority to administer the estate. This document was previously called Letters of Administration.
- **Children’s Lawyer:** The Ontario Government official responsible to look after the interests of children under the age of 18 for all legal matters, but not generally the management of a child’s money. That is done by the Public Guardian and Trustee.
- **Codicil:** An amendment to a will which makes changes or additions. A codicil must be executed with the same formalities that a will is executed. **Continuing Power of Attorney for Property:** A written document allowing a person (the donor) to name another person (the attorney) to make financial decisions on behalf of the donor, including if the donor is physically or mentally disabled.
- **Custodian:** The person named in a will to look after one’s minor children in case of death. This appointment is not binding upon the Court. The custodian used to be known as the guardian.
- **Donor:** The person appointing an attorney in powers of attorney.
- **Estate Trustee:** The person named in a will to represent the estate of the deceased person. Also known as executor.
- **Estate Trustee Without a Will:** A Court appointed person to administer the estate of a person, where that person died without a will, the executor died, the executor is unable to act, or an executor was not named. The person is also known as an

Administrator.

- **Executor:** A person or trust company named in a will to be responsible to manage the winding up of the deceased's estate. Since January of 1995, this person is technically called the Estate Trustee though the term executor is still used in wills. A female executor is called an executrix and more than one female are called executrices.
- **Family Law Act:** The Ontario Government's law that deals with rights of spouses during marriage, separation and upon death. Intestate: A person who dies without a will. A partial intestacy is where a valid will does not dispose of the whole of the estate.
- **Issue:** All persons who have descended from a common ancestor. It is a broader term than children which is limited to one generation.
- **Joint Tenants:** A form of joint ownership in which the death of one joint owner results in the immediate transfer of ownership to the surviving joint owner or owners. See Tenancy in Common.
- **Letters of Administration:** This is the old term for what is now called "Certificate of Appointment of Estate Trustee without a Will". Letters Probate: This is the old term for what is now called "Certificate of Appointment of Estate Trustee with a Will".
- **Notarial Certificate:** A certificate which a notary public signs and attaches to a copy of a document to certify that the copy is identical to the original. All lawyers are also notaries.
- **Notarial Copy:** A copy of a document to which a notarial certificate is attached.
- **Official Guardian:** This person is now called the "Children's Lawyer".
- **Per Stirpes:** Division of an estate on the basis of representation of the same lineal stock, or the same family. The beneficiary takes a share to which his or her deceased parent would have been entitled. Therefore, if there are three children of a deceased person, with each child having two children (therefore six grandchildren), then if one child is not alive, each grandchild would get 1/6th of the estate, being 1/2 of 1/3.
- **Power of Attorney for Personal Care:** A written document allowing a person (the donor) to appoint another person (the attorney) to look after the donor's personal and medical matters if the donor is unable to.
- **Probate Of Will:** Formal proof before the proper officer or court that the will offered is the last will of the testator and confirming the Executor(s) named. This is now called an Application for Certificate of Appointment of Estate Trustee with a Will.

- **Public Guardian and Trustee:** The Ontario Government official who, in the absence of a named executor, administrator or attorney, is responsible to administer an estate, or the affairs of an incompetent person. This official also manages the money of children when no trustee was appointed.
- **Settlor:** A person who establishes a trust. **Succession Law Reform Act:** The Ontario Government Act which deals with many issues of estate law, including support of dependents, what happens when a person dies without a will and the rules governing the making of wills.
- **Survivorship Application:** A document a surviving joint tenant registers in the land titles system to transfer the deceased's share of the property to his or her name only.
- **Tenancy in Common:** A form of joint ownership in which the death of one owner does not result in the immediate transfer of ownership to the surviving owner but the deceased's interest becomes part of the deceased's estate.
- **Testator:** A male person who makes a will.
- **Testatrix:** A female person who makes a will.
- **Transmission Application:** A document filed in the land titles office to have title transferred to the name of the personal representative of a deceased owner to enable the personal representative to deal with the property.
- **Trust:** A legal arrangement in which one person (the settlor) transfers title to a person (trustee) to manage the property for the benefit of a person or institution (the beneficiaries). When the trust takes effect on death it is called a " Testimony Trust" . When the trust takes effect during the settlor's lifetime, it is called a " Inter Vivos Trust" .
- **Trustee:** The person or trust company that manages property according to the instructions in the trust agreement and the laws governing trustees.
- **Will:** A legal document, prepared by a person, called a testator or testatrix if female, in compliance with formal requirements, which takes effect on his/her death and which states what he/she wants to happen to his/her property on death. The will also decides who manages the property. The will may discuss custody of minor children and the funeral arrangements, though custody is not binding upon the Court and the funeral arrangements do not technically have to be followed by the executor.

## Will Questionnaire

### 1.PERSONAL PARTICULARS

FULL NAME

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OCCUPATION \_\_\_\_\_ WORK PHONE NUMBER \_\_\_\_\_

BIRTH DATE & PLACE \_\_\_\_\_

FULL NAME

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OCCUPATION \_\_\_\_\_ WORK PHONE NUMBER \_\_\_\_\_

BIRTH DATE & PLACE \_\_\_\_\_

ADDRESS

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CITY \_\_\_\_\_ POSTAL CODE: \_\_\_\_\_

HOME PHONE#

---

FAX #

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EMAIL

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FULL NAMES, ADDRESSES AND BIRTH DATES OF CHILDREN: \_\_\_\_\_

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## 2. PROPOSED EXECUTORS AND TRUSTEES

*Executors and Trustees are Persons who administer the estate.*

Full names and addresses of proposed Executors and Trustees:

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Full names and addresses of alternate Executors and Trustees if above should not be alive:

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## 3. PROPOSED CUSTODIAN

*The Custodian would be the guardian of your children should you die.*

Proposed Custodian of children:

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Proposed Alternate Custodian:

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## 4. DISTRIBUTION OF ESTATE a) Proposed Distribution: Names of beneficiaries

(complete names and addresses of charitable institutions) and amount of bequest or item to be bequeathed:

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Residue of Estate (Balance of estate after debts paid) \_\_\_\_\_

b) Alternate Distribution: Names of beneficiaries (if persons above are not living at the time of your death):

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**5. AGE CHILDREN AND GRANDCHILDREN TO RECEIVE BEQUEST:**

Children: 18 \_\_\_\_\_, 21 \_\_\_\_\_, 23 \_\_\_\_\_, 25 \_\_\_\_\_, other \_\_\_\_\_

Grandchildren: 18 \_\_\_\_\_, 21 \_\_\_\_\_, 23 \_\_\_\_\_, 25 \_\_\_\_\_, other \_\_\_\_\_

**6. SPECIAL FUNERAL INSTRUCTIONS**

Cremation: YES \_\_\_\_\_ NO \_\_\_\_\_

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**7. LOCATION OF PREVIOUS WILL**

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**8. OTHER INFORMATION that may be relevant to be discussed at interview:**

Previous Marriages:

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Marriage Contracts:

*Note: This form is designed for a single person or a couple who have the same instructions. If the couple have different instructions, please use a separate page for each person to provide the information.*

**Continuing Power of Attorney  
for Property Questionnaire**

Name

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Attorney(s)

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Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Alternate Attorney(s)

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Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Conditions, Restrictions (gifts, charities)

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Name

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Attorney(s)

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Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Alternate Attorney(s)

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Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Conditions, Restrictions (gifts, charities)

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**Personal Care Power of Attorney Questionnaire**

Name

\_\_\_\_\_

Attorney(s)

\_\_\_\_\_

Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Alternate Attorney(s)

\_\_\_\_\_

Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Clause directing no life support

Yes \_\_\_\_\_ No \_\_\_\_\_

Specific Directions

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Name

\_\_\_\_\_

Attorney(s)

\_\_\_\_\_

Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Alternate Attorney(s)

\_\_\_\_\_

Jointly & Not Severally: \_\_\_\_\_ Jointly & Severally: \_\_\_\_\_

Clause directing no life support

Yes \_\_\_\_\_ No \_\_\_\_\_

Specific Directions

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

NOTES:

Partially complete this form with the balance to be finalized at your consultation with the lawyer.

- Attorneys for personal care: The attorney may not be the following people: your landlord, social worker, counsellor, teacher, advocate, doctor, nurse, therapist or other health care provider, homemaker or attendant, or any person who provides care for you in the place where you live.
- Jointly and not separately means all need to sign. Jointly and severally means either can sign.
- Life Support: is like a living will clause which directs that life support system not be used if there is no expectation of recovery.

**Will and Power of Attorney Asset Information**

Bank Accounts (Please note Bank Name, Branch and Account Ownership)

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Stocks, Bonds, Investment Certificates (Please note ownership - whose name or joint)

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Insurance Company (Please note Beneficiary)

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Pension and Annuities, Registered Retirement Savings Plans, RIF's  
Company, Payments from an Estate

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Real Estate (Please note address and ownership)

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## Business Interests

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*Note: This form is designed for a single person or a couple who have the same assets. If the couple have different interests, please use a separate page to provide the information.*

## **Fee Schedule**

**As of June, 2005**

### **Wills and Powers of Attorney**

#### **WILL ONLY**

For one person: \$250.00

For two people: \$375.00 (2nd one for partner made at the same time)

#### **CONTINUING POWER OF ATTORNEY FOR PROPERTY & PERSONAL CARE POWER OF ATTORNEY (If drafted at the same time as a Will)**

For one person: \$125.00

For two people: \$200.00

#### **REVISED WILLS & POWERS OF ATTORNEY**

To revise a Will originally drafted by Lawrence Pascoe, my fee is \$175.00 for the first Will and \$100.00 for second revised Will of partner made at the same time, provided the change is minor enough to discuss over a telephone consultation.

If there is a very minor change to the Will, it may be accomplished by a Codicil (a legal document that only sets out changes in the Will). The client may consider doing the codicil themselves following the precedents set out in Lawrence Pascoe's article "Changing Your Will".

If revising the Powers of Attorney at the same time, there is a discount applied to the cost of the Powers of Attorney. Therefore, to revise the Will and Powers of Attorney for one person, the cost is \$250.00. To revise the Wills and Powers of Attorney for two people, the cost is \$400.00.

#### **FULL PACKAGE: 2 WILLS, 2 CONTINUING POWERS OF ATTORNEY FOR PROPERTY, 2 PERSONAL CARE POWERS OF ATTORNEY**

For a couple obtaining Wills, Continuing Powers of Attorney for Property and a Personal Care Powers of Attorney the total cost would be \$575.00 plus GST of \$40.25 for a total of \$612.25.

For one person obtaining a Will, Continuing Power of Attorney for Property and Personal Care Power of Attorney, the total cost would be \$375.00 plus GST of \$26.25 for a total of \$401.25.

#### **POWERS OF ATTORNEY WITHOUT A WILL AT THE SAME TIME**

One Personal Care Power of Attorney and one Continuing Power of Attorney for Property: \$200.00

Two Personal Care Powers of Attorney and two Continuing Powers of Attorney for Property: \$300.00 (2nd one for partner made at the same time)

\*\* Prices quoted are for relatively standard Wills which do not necessitate more than a forty-five minute consultation for a couple, or a thirty minute consultation for a single person. A standard Will does not involve sophisticated drafting. If this is required, an extra charge based upon my hourly rate of \$275 will be charged. This very rarely occurs.

## Procedure

After completing the Information Sheets and Questionnaires, please make an appointment with my office. At your appointment, I will obtain your instructions to draft the Will and if requested, a Continuing Power of Attorney for Property and a Personal Care Power of Attorney. I will then send you a copy of the drafted Will and Powers of Attorney for your review and approval. You would then contact me or my secretary, Tara Bassett, to advise if there are any changes to the drafts and to make an appointment for the signing of the will and powers of attorney. You may call me if you have questions. Questions and changes should not wait until the date of signing as the final papers will have all been prepared.

If you are just doing Powers of Attorney then after completing the Powers of Attorney Questionnaires please telephone me. On the telephone I will answer any questions you may have and complete the Powers of Attorney Questionnaires. I will then send you drafts of the Powers of Attorney for your review at home. If the drafts are satisfactory you would then call my office for an appointment to sign your Powers of Attorney.

Upon the signing of the will at my office, you will receive the Mirsky Pascoe Will Manual. This binder contains a copy of your Will, memorandum of what to do when death occurs, a memorandum regarding burial instructions, a memorandum regarding personal belongings, an asset list (to keep up to date where all your assets are located), and a number of articles I have written related to wills and estate planning. They are “Administration of Estates”, “Changing Your Will”, “Gifts and Inheritances to Children” and “Preparing for an Easier Administration of an Estate”. You might want to also insert here the three articles you received in your “Will Packet”. You may take the original Will with you, or at no extra cost I can store the Will in my fire proof safe. Of course, if I placed your Will in my office safe, it is available to you at any time or your executor on your death.

You will be signing two copies of each of the Powers of Attorney. One you will keep and the other will be kept on my file in case the original is lost. There is, however, only one original copy of the will though I will have a true copy on my file. If you wish, I can send a letter to your executors advising them of the location of the will and the existence and purpose of your manual, and enclosing a copy of my articles “The Administration of Estates” and “Powers of Attorney” so they have a preliminary idea of their duties. I have recently set up a client data base to keep my clients informed of major changes in the law.

## **My Service Principles**

### **The Pascoe Difference**

Providing competent and economical legal services is extremely important to me. In addition, I am committed to delivering products that are innovative and very client-oriented. This has resulted in aspects of my service, which my clients have appreciated, which are not found elsewhere.

These value added features are found at every stage of my services. I start with [my Packets](#) , which serve many functions. They contain articles that give an overview of the law in non lawyer's terms. These articles discuss the legal process and your rights and obligations. The Packets contain information forms to show what facts are required to process the file. Knowing something about the law and preparing the information needed beforehand reduces the time spent at the initial consultation and therefore reduces your costs. The Packets contain [my detailed resume](#) of my years of experience since 1977 and [a schedule of my fees](#) . I believe that your anxiety level will be reduced even before our first consultation with all this information about the law, the process, myself, the fees and the facts.

At the next stage of my Family Law and Estate Administration services I introduce my Manual. The Manual serves two important functions. It contains more articles, checklists and work sheets, all with details needed to help you better understand the process. There is so much to know and remember. It is good to have that information in a written, comprehensive and organized form. The Manual is a convenient place to hold letters and the sometime voluminous documentation generated throughout the file. I ensure my clients get copies of everything — you are kept informed. Obtaining and storing this information in an organized fashion allows you to participate and to make better decisions. The Manual also serves as a good record of what occurred after the file is completed. This is also important for necessary follow up work.

In a Will and Powers of Attorney matter the Manual does not come into play until the final stage of the file. It then serves the same functions stated above with more of an emphasis for keeping on going records and for following up matters. In Will and Powers of Attorney files I send letters to the Executors and Attorneys with articles and information that they should know to assist them with their responsibilities.

After the file is complete I keep in touch with my clients by emailing to advise of any updates to my web site. On my web site, I post new articles and have a [Resource Page](#) documenting other Web sites of legal interest. I now have a data base on each client. When a client calls me after the file is closed, I can quickly obtain the major particulars of their file. I can probably answer questions faster and not have to wait to get the file from storage. I encourage clients to call me any time after the file is complete with questions — yes, even though I am not getting paid for this additional work. My magnetic refrigerator business card means my phone number is always nearby.

I am continually striving to improve my services. That is why at all stages of my service I

encourage opinions and have client surveys. I have [Client Survey Contests](#) with prizes to obtain that important feedback from clients and or even prospective clients. Many good ideas have come from clients that have resulted in improvements to my service — I listen to my clients.

Many law firms are beginning to advertise and to market their services aggressively even using professional advertising agencies. Some of their ads will promise a commitment to excellent client service at a reasonable price. What firm, what business, would not say that it provides good service at a fair cost ? I invite you to compare the actual features, and not the rhetoric, of other lawyers's services with mine. I believe that I have given you concrete examples of how I provide innovative and client-oriented legal services.

***LAWRENCE S. PASCOE***

## Resume of Lawrence Stephen Pascoe

▶ **Email:** [lpascoe@thepascoedifference.com](mailto:lpascoe@thepascoedifference.com)

▶ **Birth Date and Place:** October 22, 1949, Toronto, Ontario

▶ **Education and Professional Qualifications:**

- Bachelor of Commerce (Honours), [Dalhousie University](#) (1972)
- Bachelor of Laws, Dalhousie University (1975)
- Ontario Bar Admission Course (1977)
- Family Mediation Training Course (1990)
- Collaborative Lawyers Training Course (2001-2002)

▶ **Specific Areas of Practice:**

- *Family Law:* acting for clients in divorce and family litigation; negotiating marriage contracts and separation agreements;
- *Wills and the Administration of Estates:* preparing wills and powers of attorney; acting for executors, estate trustees and attorneys

▶ **Organization Affiliates:**

- [Canadian Bar Association](#)
- American Bar Association
- [County of Carleton Law Association](#)
- Law Society of Upper Canada
- Member of Annual Family Law Institute Organizing Committee (1999 to present)
- Member of [Collaborative Law Network](#)

▶ **Teaching Experience:**

**Course instructor,**

- [Algonquin College](#) , Legal Assistant Program (1978-1980)

**Seminar leader,**

- Ontario Bar Admission course Family Law (1986)
- Law Society Continuing Education Program on Pensions and Family Law (1988, 1994)
- Ontario Bar Admission Course Practice skills (Family Law),(1989, 1990);  
Negotiating Skills (1993, 1996)

**Speaker,**

- Ontario Bar Admission Course; dependent's relief claims in estates (1988 - 1990)

- Ontario Law Society Continuing Education Program dealing with estate litigation (Dependent's Relief Claims), 1987
- Ontario Law Society Continuing Education Program; marriage contracts (1987 - 1988)
- Canadian Bar Association Annual Institute Program; Pensions and Family Law (1989)
- Law Society Continuing Education Program for Legal Secretaries; preparing Financial statements
- Law Society Continuing Education Program for Family Law Lawyers; Employment Benefit Clauses (1990)
- Canadian Society for the Advancement of Legal Technology (1994, 1996)
- Family Law Motions: Practice and Strategy (1994)
- Institute of Family Law, The Life Insurance Clause in Separation Agreements (1996)
- Federation of Law Societies, The Life Insurance Clause in Separation Agreements (1998)
- County of Carleton Law Association and Law Society Continuing Education Program, Determining Income of the Self-Employed under the Child Support Guidelines (1999)
- Law Society Continuing Education Program, Basic Management Principles for Lawyers (May 2000)
- Law Society Technology for Lawyers conference, Some Thoughts on Producing and Marketing a Law Firm's Web Site (November 2003)

► **Public Speaking:**

Ontario Provincial Employees Association, [Canada Post](#) , Alta Vista Synagogue, Ukrainian Orthodox Church, Class for new Canadians, Laurentian High School, Ottawa Community Credit Union Ltd., [Children's Hospital of Eastern Ontario](#) , London Life Insurance Agents, Ottawa/Skyline T.V. Cable Phone-in Law Program on Family Law, a Divorce Support

Group, National Capital Retirement Education Association, National Council of Jewish Women Palliative Care Seminar, Ottawa Valley Adjusters Association, The [Ottawa Citizen](#) Retirement Education Programme, Retirement Education Program Carleton Separate School Board, Retirement Education Program, City of Nepean (now City of Ottawa), The Ottawa Civic Hospital Employees, University of Ottawa Law School, [Royal Ottawa Hospital](#) , [Unicad Canada Ltd.](#) , [Money Concepts](#) , Canterbury High School.

▶ **Written Articles** (please visit my [articles](#) page for an online list):

- Support (unpublished except on Web site)
- Custody and Access (unpublished except on Web site)
- Powers of Attorney (unpublished except on Web site)
- Changing your Will (unpublished except on Web site)
- Reasons for Having a Will (C.J. Journal South and Women's Credit Union Handbook)
- Professional Negligence and Responsibility Issues for lawyer's in dealing with Marriage Contracts (Ontario Law Society Continuing Education Program in 1987 published by Carswell Company in 1988 in a book entitled Marriage Contracts (1988)
- Administration of Estates (C.J. Journal South)
- Custody and Access to Children (C.J. Journal South)
- Family Mediation (O.A.F.M. Newsletter)
- Division of Assets (Clarion Newspaper, April, 1989)
- Wills and Minor Children (Clarion Newspaper, May, 1989)
- Separation and Divorce (Clarion Newspaper, Sept., 1989)

- Division of Pensions on Marriage Breakdown (Clarion Newspaper, Jan. 1990)
- Marriage Contracts (Clarion Newspaper, March, 1990)
- Employment Benefits (Law Society Continuing Education, April, 1990)
- Updating your Will (Clarion Newspaper, Summer, 1990)
- Lawyer Client Relationship (Clarion Newspaper, Autumn, 1990)
- Preparing For An Easier Administration of an Estate (Clarion Newspaper, Winter 1991)
- Divorce Mediation (Clarion Newspaper, April, 1991)
- Agreements of Purchase and Sale (Clarion Newspaper, August 1991)
- Lawyer's Role When Purchasing a Home (Clarion Newspaper, Sept., 1991)
- Lawyer's Role When Selling a Home (Clarion Newspaper, Oct., 1991)
- The Legal Process in Matrimonial Disputes - Part 1  
(Clarion Newspaper, Nov., Dec. 1992, Jan. 1993)
- Using Technology to Improve Marketing of Legal Services  
(CSALT Annual Conference, April, 1994)
- Family Law Motions: Practice and Strategy (Law Society Continuing Education)  
(June, 1994)
- Marketing, Technology & The Sole Practitioner/Small Law Firm  
(CSALT Annual Conference, May 1996)
- The Life Insurance Clause in Separation Agreements  
(Family Law Annual Institute, May 1996)

- The Life Insurance Clause in Separation Agreements (National Family Law Conference, June 1998)
- Determining Income of the Self-Employed under the Child Support Guidelines (Law Society Continuing Education Program, 1999)
- Some Basic Management Principles for Lawyers, Law Society Continuing Education, May 2000
- Some Thoughts on Producing and Marketing a Law Firm's Web Site (Law Society Technology for Lawyers conference, November 2003)

## Survey Contest

Client feedback is necessary to improve the quality of legal services I provide to my clients. Client surveys are an effective method to obtain that response. These surveys tell me what the client thinks about the way I practice, and allow the client to make suggestions on how service can be improved. Generally, lawyers look at matters through their own eyes rather than from the client's perspective. The same is true for the methods of marketing of legal services. I would therefore appreciate it if you would take some time to fill out the questionnaires — one dealing with my packets and the other with choosing a lawyer. It will greatly help me provide better service and improve my marketing.

My experience is that people do not like filling out questionnaires. Therefore, I am offering a contest to obtain a good response. Annually on January 31st, I will award a prize of a pair of FREE Ottawa Senators tickets for the best comments on improvements of services, marketing or packets.

You may mail, fax, e-mail, or deliver to our office your completed survey questionnaire. All information and names of respondents will be kept confidential. You do not need to become a client to enter the contest.

I look forward to reading your comments.

## Will and Powers of Attorney Packet Survey

Did you have a will at the time you requested the will packet?

Yes \_\_\_\_\_ No \_\_\_\_\_

Why did you request the packet (one or a combination of the following)?

- \_\_\_\_\_ (a) you were thinking about making a will for the first time
- \_\_\_\_\_ (b) you were thinking of making a new will
- \_\_\_\_\_ (c) you wanted general information about wills
- \_\_\_\_\_ (d) you wanted information about powers of attorneys
- \_\_\_\_\_ (e) you knew that you wanted a will, but were not sure which lawyer to choose
- \_\_\_\_\_ (f) you wanted to know Lawrence Pascoe's fee for making a will
- \_\_\_\_\_ (g) other \_\_\_\_\_

Did the packet fulfill your expectations?

Yes \_\_\_\_\_ No \_\_\_\_\_

If not, why not?

\_\_\_\_\_  
\_\_\_\_\_

What did you think of the packet in general?

- (a) \_\_\_\_\_ excellent
- (b) \_\_\_\_\_ good
- (c) \_\_\_\_\_ fair
- (d) \_\_\_\_\_ poor

Did you read the articles? Yes \_\_\_\_\_ No \_\_\_\_\_

If not, why not?

- (a) Too complicated \_\_\_\_\_
- (b) Not interested \_\_\_\_\_
- (c) Other \_\_\_\_\_

Were the articles:

understandable \_\_\_\_\_, not understandable \_\_\_\_\_

Were the articles:

too short \_\_\_\_\_, too long \_\_\_\_\_, just right \_\_\_\_\_

Did you find the articles helpful?

Yes \_\_\_\_\_ , No \_\_\_\_\_

Were the graphics, layout and print of the articles acceptable?

Yes \_\_\_\_\_ , No \_\_\_\_\_

General comments about the articles - questions not addressed.

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Did you find the memorandum on cost and procedure helpful?

Yes \_\_\_\_\_ No \_\_\_\_\_

If not why not? Do you have any comments on it?

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Did you like receiving the resume?

Yes \_\_\_\_\_ No \_\_\_\_\_

Was there anything else you would have liked to see in the resume?

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Did you have problems completing the Will Information Sheet?

Yes \_\_\_\_\_ No \_\_\_\_\_

Did you find the cost for preparing a will:  
reasonable \_\_\_\_\_, too high \_\_\_\_\_, too low \_\_\_\_\_.

Comments

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Do you intend on making an appointment to make a will?

Yes \_\_\_\_\_ No \_\_\_\_\_.

If not, why not?

(a) decided against doing a will \_\_\_\_\_

(b) cost is too high \_\_\_\_\_

- (c) chose another lawyer \_\_\_\_\_. If so, why? \_\_\_\_\_
- (d) other \_\_\_\_\_

If you are still considering making a will what is the delay?

- (a) waiting to collect information \_\_\_\_\_
- (b) can not make a decision as to
- (i) beneficiaries \_\_\_\_\_ (ii) executor \_\_\_\_\_ (iii) custodians \_\_\_\_\_
- (c) other \_\_\_\_\_

How did you find out about the packet?

- (a) Yellow Pages \_\_\_\_\_
- (b) The Clarion \_\_\_\_\_
- (c) The Kanata Kourier \_\_\_\_\_
- (d) Today's Seniors \_\_\_\_\_
- (e) Friend \_\_\_\_\_
- (f) Other \_\_\_\_\_

If you found out about the packet through an advertisement what did you think of the ad?

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If you found out about the packet from an advertisement, how many times did you see the ad before you replied?

Once \_\_\_\_\_, Twice \_\_\_\_\_, More than twice \_\_\_\_\_

What do you think about the idea of the survey contest?

- (a) good idea \_\_\_\_\_
- (b) bad idea \_\_\_\_\_
- (c) Comments

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Do you have any other comments?

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Name

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Address

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Home Phone Number

---

Work Phone Number

---

E Mail Address

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Date

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## Choosing a Lawyer Survey

1. Have you ever used a lawyer? Yes \_\_\_\_\_, No \_\_\_\_\_

2. If yes to question number 1, how did you choose a lawyer the last time you used him or her? (You may choose a combination of factors, but please rate the priorities of the reasons)

- \_\_\_\_\_ (a) Location of Office
- \_\_\_\_\_ (b) Recommendation of a friend
- \_\_\_\_\_ (c) Previously used that lawyer
- \_\_\_\_\_ (d) Yellow Pages Advertisement
- \_\_\_\_\_ (e) Newspaper Advertisement
- \_\_\_\_\_ (f) Recommendation of a related business contact (eg: real estate agent)
- \_\_\_\_\_ (g) Lawyer spoke to a group you belong to
- \_\_\_\_\_ (h) Read about the lawyer in a newspaper or saw on television

3. What factors are important to you when choosing a lawyer? Please rank in order of importance.

- \_\_\_\_\_ (a) Location of office
- \_\_\_\_\_ (b) Hourly rate or fee
- \_\_\_\_\_ (c) Number of years of practice
- \_\_\_\_\_ (d) Specialist in the area of law required
- \_\_\_\_\_ (e) The recommendation of a previous client
- \_\_\_\_\_ (f) The recommendation of a business contact
- \_\_\_\_\_ (g) An attractive advertisement

4. Did you refer friends to your previous lawyer? Yes \_\_\_\_\_, No \_\_\_\_\_

If not why not?

- \_\_\_\_\_ (a) Did not like the work done
- \_\_\_\_\_ (b) Did not like the lawyer's personality
- \_\_\_\_\_ (c) Did not like the fee charged
- \_\_\_\_\_ (d) Did not like how long the work took
- \_\_\_\_\_ (e) Did not have the opportunity to refer friends
- \_\_\_\_\_ (f) Did not think of referring friends
- \_\_\_\_\_ (g) Other

5. Comments about Choosing a Lawyer

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Name

---

Address

---

---

Home Phone Number

---

Work Phone Number

---

Mail Address

---

Date

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