

YOUR LEGAL CHECKUP

Personal and Family Matters

Yes No

General

1. Do you have a file, stored in a secure and fireproof location, containing all important documents (wills, powers of attorney, securities, contracts, marriage or divorce papers, deeds, pension plans, etc) Yes No
2. Is your record retention adequate? Do you know the length of time required to keep your records, e.g. for tax purposes, legal claims, etc.? Yes No

Estate Issues

3. Do you have a will that has been reviewed within the past three years? Yes No
4. Do you have powers of attorney for property and for personal care that have been reviewed within the past three years? Yes No
5. Are there any estate planning changes that should be considered? Yes No
6. Have you, within the past three years, reviewed the beneficiary designation on all documents (such as insurance policies, RRSPs, RIFs) requiring such information? Yes No

Family Law Matters

7. Have you, in the past three years, reviewed family law issues in your domestic situation, considered the need for a domestic agreement, (or the need for updating its terms if you have an agreement in place)? Yes No

Insurance

8. Do you have any financial or liability exposures that are insurable but presently uninsured (e.g., disability insurance or umbrella policy)? Yes No
9. Have the liability policy limits changed within the past three years? Yes No
10. Are there any potential claims that could be asserted against you? Yes No

Financial and Property Records

11. Do you have a complete and current personal financial statement that lists all your personal assets and liabilities in detail? Yes No
12. Do you have a complete and current inventory of all your physical possessions, sufficient to support a claim in the event of a loss? Yes No
13. Do you presently have a written and current list of all important future dates, such Yes No

as expiration, option, maturity and due dates?

Your family's legal needs

14. To the extent that the foregoing questions are relevant to your spouse (if any) and minor children (if any), are there any matters or issues that should be updated, reconsidered or changed?
15. To the extent that there are persons other than spouse or children for whom you may have some responsibilities (e.g., aging parents), are there items or issues that should be updated or changed?

Benefits and beneficiaries

16. Are you aware of, and do you have a current valuation of, all potential government benefits to which you are or will become entitled?

Other legal exposure

17. Is there any other major category of personal legal exposure that should be included on this summary list? (Please specify.)

Business and Employment Issues

Contracts and Agreements

18. Is your standard consulting or employment contract or partnership agreement both current and adequate for your present needs?

Business Enterprise

19. Is your business structure appropriate for your current business needs? (Sole owner? Partnership? Corporation?)
20. Are your business records up to date? *e.g.*, corporate minutes, resolutions
21. Do you have a power of attorney to look after your business should you become incapacitated or unable that has been reviewed within the past three years?
22. Have you reviewed family law issues that could affect your interest in your business and considered the need for a domestic agreement to protect your business? And if you have one in place, has it been reviewed in the past three years?
23. Are you and your key personnel adequately covered by policies of life, vehicle, liability (both personal and professional), disability, umbrella and other insurance?
24. Do you have a complete and current inventory of all your business's physical possessions, sufficient to support a claim in the event of a loss?

25. To the extent that the foregoing questions are relevant to your key personnel, are there any matters or issues that should be updated, reconsidered or changed?

Other business legal exposure

26. Is there any other major category of business legal exposure that should be included on this summary list? (Please specify.)