

Step 5: The Estate Planning Diagnostic

Is your house in order?

Are your Estate documents updated and in place?

Properly revised Will
An Enduring Power of Attorney
Living Will
Review of life insurance policies
Shareholder Agreements

Will you have taxes or other Estate costs at your death, and how will these be paid?

Capital Gains tax
RRSP/RIF taxation
Probate fees

We will engage in robust analysis to minimize taxes and costs to your Estate. We will listen to your Estate goals and then offer suggestions to ensure all your affairs are in order in conjunction with your lawyer and accountant.