

LETTER OF WISHES

Testator Name: _____

Introduction:

This Letter of Wishes is intended to provide guidance and express the wishes of the Testator regarding the distribution and management of their estate and any related matters. It is not legally binding but is to be considered by the Executor(s) and Trustee(s) when administering the estate.

1. General Wishes:

The Testator entrusts the Executor(s) and Trustee(s) to carry out the provisions of the Will faithfully, fairly, and in accordance with applicable Canadian laws. Special consideration should be given to the Testator's family members and dependents to ensure their well-being and support.

2. Personal Effects and Heirlooms:

The Testator wishes that personal belongings, family heirlooms, and sentimental items be distributed as follows, recognizing the sentimental value these items hold: Specific gifts to named individuals should be made with consideration to fairness among beneficiaries.

3. Care of Dependents:

The Testator requests that the Executor(s) prioritize the financial security, education, and general welfare of any minor or dependent children. Appropriate guardianship arrangements should be made in accordance with the Will or as otherwise lawfully determined.

4. Charitable Donations and Bequests:

Where applicable, the Testator wishes to support charitable organizations that align with their values and beliefs. The Executor(s) should consider the named charities in the Will or select appropriate recipients if none are specified.

5. Management and Investment of Estate Assets:

The Testator trusts the Executor(s) and Trustee(s) to manage estate assets prudently, seeking professional advice when necessary. The preservation of capital and reasonable income generation should be balanced in decisions concerning investments.

6. Funeral and Burial Wishes:

The Testator expresses a preference for a simple and dignified funeral or memorial service. Details such as preferred burial site, religious ceremonies, or other arrangements should be respected if known.

7. Executor(s) and Trustee(s) Guidance:

The Testator advises Executor(s) and Trustee(s) to act with integrity, impartiality, and in accordance with Canadian law. Any conflicts of interest should be disclosed, and professional advice sought when necessary to ensure proper administration.

8. Confidentiality and Privacy:

The Executor(s) and Trustee(s) are requested to handle all matters related to the estate with the utmost confidentiality, respecting the privacy of beneficiaries and other parties involved.

9. Amendments and Revocation:

The Testator reserves the right to amend or revoke this Letter of Wishes at any time, and any such changes shall supersede previous versions. This Letter should be considered alongside the Testator's Will and other estate planning documents.

10. Closing Statement:

This Letter of Wishes reflects the Testator's heartfelt intentions and is provided to assist those tasked with administering the estate in accordance with Canadian law. It is not intended to create legally enforceable obligations but to guide the Executor(s) and Trustee(s) in fulfilling their duties.

TESTATOR'S SIGNATURE

Signature: _____

Print Name: _____

Date: _____

WITNESS SIGNATURE

Signature: _____

Print Name: _____

Date: _____

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