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CLIENT INTAKE FORM (WILL/POA)

- 1. Full Name(s) of all Person(s):
2. Contact (Phone and Email):
3. Date of Birth for the Person(s):
4. Spousal status for all Person(s):
5. Do you have a current Will/POA:
6. What documents will our office be preparing:
7. How were you referred to our office:

CHECKLIST

A. Identification: Two (2) pieces of government-issued identification for each person (front and back, in colour) in accordance with Law Society of Ontario and Lender requirements. One of the IDs must be a Permanent Resident Card or Canadian Passport. Please note that a Health Card is not acceptable.
B. Signing: Documents must be signed in person, our address is 5805 Whittle Road, Suite 212, Mississauga, Ontario L4Z 2J1. Free parking is available.

** All information will be kept in the strictest of confidence. **