



The Diocese of Edmonton Planned Giving Office

One Size Does Not Fit All

Are you the same as your neighbor, or even your brother? Is your family financial situation the same as everyone else's? I would venture to guess it is not, but that is what people who use will kits or on-line wills are saying.

You cannot lose sight of the fact that both you and your situation are unique. This uniqueness is what must be reflected in your estate planning documents. More particularly, your will must reflect what your assets will be at the time of your death, who you want to receive those assets and in what fashion. For example, if one or more of your beneficiaries is not capable of dealing with money, or if you are in a second marriage and you want your children from the first marriage to receive a benefit from your estate at some point, you need a will to reflect these circumstances.

A qualified estate lawyer will be able to ask the questions necessary to formulate the proper will—questions that you may not know to ask. Considering that the disbursement of your lifelong assets is one of the most important decisions of your life, it makes sense to engage someone who has the experience and skills to cover every possibility.

Not every lawyer is skilled in estate planning. Lawyers generally specialize, whether in business law, litigation, employment or other specific areas. To find a good estate lawyer, speak to friends and other professionals such as accountants or investment advisors. They will have had experience with various estate lawyers and will be able to guide you to someone that you can talk to. The Planned Giving Office also has a list of estate lawyers from which you can choose.

If you have questions or want to learn more about this, or any other, type of planned gift, please contact me, in confidence and without obligation, at the following:

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