

Estates&TrustsSource™
Build-a-Will
Quick Reference Card

Westlaw® Canada

State-of-the-art Build-a-Will application on Estates&TrustsSource allows you to efficiently generate superior quality, authoritative, professional-looking wills ready for execution by your client.

Build-a-Will utilizes the precedent clauses from Carswell's Estate Planning Precedents authored by Lindsay Histrop. You can create customized wills, based on your client's unique circumstances, for every Canadian province with the exception of Quebec.

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CUSTOMER LEARNING & SUPPORT TEAM

For technical or reference support or to inquire about training, contact Carswell at:

Toll-Free: 1.800.387.5164 / **In Toronto:** 416.609.3800

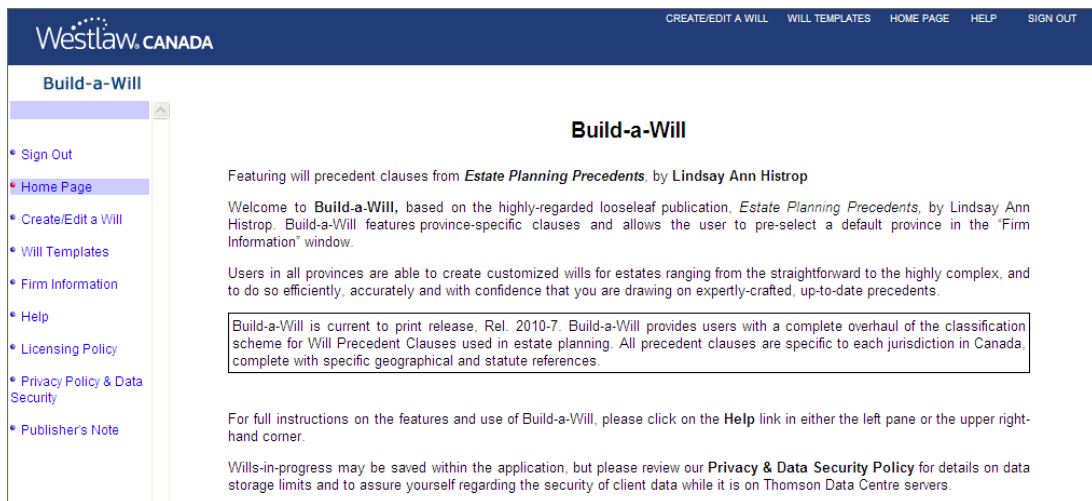
www.westlawcanada.com

01 ACCESSING BUILD-A-WILL

1. Open a web browser, access www.westlawcanada.com and click **Sign-On to Westlaw Canada** located in the upper right corner.
2. Click **Switch to OnePass Sign On** located in the upper right corner of the sign on section. You may wish to bookmark this page.
3. Enter your **OnePass Username** and **Password** into the fields provided.
4. Enter a client identifier into the **Client ID** field. **This is a mandatory field** used for tracking your research and will name your Research Trail. You may enter up to 35 alphanumeric characters. Examples: a file number or research issue.
5. Click **Sign On**. Your default Home page is displayed.
6. Click **Build-a-Will** located in the **Estate Planning** section of the Estates&TrustsSource Home page.

02 THE BUILD-A-WILL HOME PAGE

Build-a-Will is a separate application that opens a new window upon launch.



Sign Out: Click to exit Build-a-Will.

Home Page: Click to retrieve the Build-a-Will Home page.

Create/Edit a Will: Click to create or edit an existing will.

Will Templates: Click to create, retrieve or delete a template.

Firm Information: Click to input or edit your firm's information.

Help: Click to retrieve the Build-a-Will Quick Reference Card.

Licensing Policy / Privacy Policy & Data Security: Click the appropriate link to view our software policies.

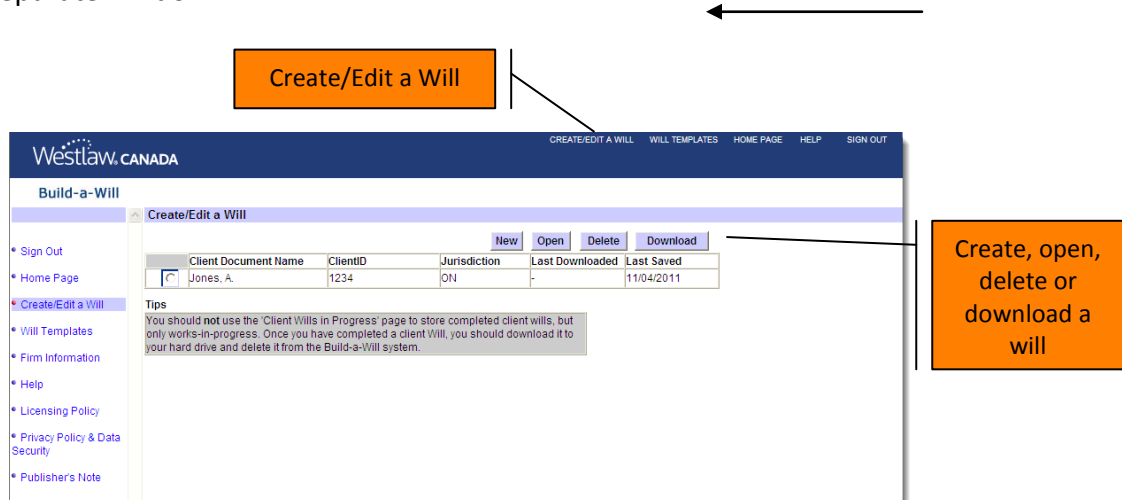
Publisher's Note: Click to retrieve information about recent updates to the will clauses.

03 CREATING A WILL

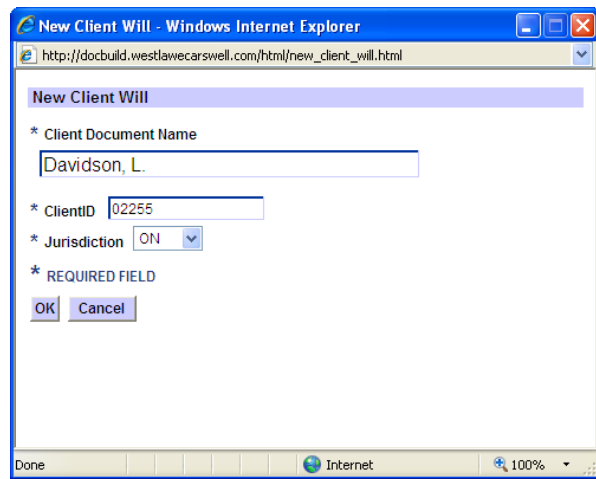
1. Click **Create/Edit a Will** in the left frame or in the upper right corner of the screen. The **Create/Edit a Will** page appears listing wills that are currently in progress.

Note: You must enter your firm's details on the **Firm Information** page prior to creating your first will. See *Firm Information* for more information.

2. Click the **New** button located the right frame. The **New Client Will** page appears in a separate window.



3. Enter the **Client Document Name** and **ID** into the fields provided and click **OK**.



A list of clause types appears in the left frame along with the client information at the top of the page.

4. Select the specific clause type you want from the left frame to see its details and enter applicable information as prompted. The full text of the clause along with the information you entered appears in the right frame. Information auto-fills in the document wherever appropriate (you only need to enter a given piece of information, e.g. testator's name, once).

The screenshot shows the Westlaw Canada 'Build-a-Will' interface. At the top, there are navigation links: CREATE/EDIT A WILL, WILL TEMPLATES, HOME PAGE, HELP, and SIGN OUT. Below this, the 'Build-a-Will' section includes fields for 'Document: Davidson, L.', 'Document Type: Client Will', and 'ClientID: 02255'. There are buttons for 'Save', 'Save As', 'Clear All', 'Clause List', and 'Download'. On the right, it shows 'Wills Remaining: 18' and 'Templates Remaining: 30'. The main area is split into 'Build Document' and 'Preview Document'. The 'Build Document' pane shows a list of clauses under 'Introductory and Revocation -- Ontario'. The 'Preview Document' pane shows the rendered text of the selected clause. An orange callout box on the left points to the clause list with the text 'Select a clause'. Another orange callout box on the right points to the preview pane with the text 'Click to preview or print the clause'.

Click **Save** to save your will within Build-a-Will.

Click **Clause List** to view only those clauses you selected for your will in the right frame.

Click **Save As** to save your will with another name or save it as a template.

Click **Download** to download your will to your computer.

Click **Clear All** to reset your clauses.

You can pick the clauses you need in any order – Build-a-Will orders and numbers them appropriately.

5. When finished, click **Download** to download your will onto your computer and save it in an **.RTF** format. You may open and edit, if necessary and print the document in Word or WordPerfect.

04 SAVING A WILL

To save a will, click **Save** or **Save As**, whichever is applicable to your situation.

Click **Save** to save the will within the Build-a-Will application and continue working on it.

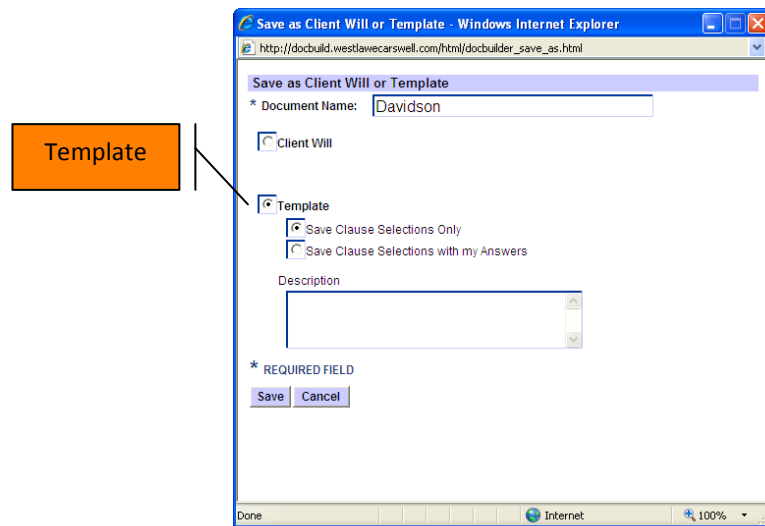
Click **Save As** to save the will (within the Build-a-Will application) with another name or save it as a template (See **Creating a Template** below for more information). You can create and save up to 30 will templates designed to address recurring situations.

You can save wills in progress within the application, subject to a limit of 20 documents.

05 CREATING A TEMPLATE

You can create and save up to 30 templates in Build-a-Will. Templates contain clauses that are reused across multiple client wills; thereby removing the task of having to create each will from scratch.

1. Click **Save As** after you have created a will. The **Save as Client Will or Template** page appears.
2. Enter the document name and select the **Template** radio button.
3. Choose to save the clause selections only or your answers as well.
4. Enter a description in the box provided, if you want.



5. Click **Save**.

To access Will Templates, click **Will Templates** in the left frame or upper right corner of the screen.

Will Templates

Westlaw.CANADA CREATE/EDIT A WILL WILL TEMPLATES HOME PAGE HELP SIGN OUT

Build-a-Will

Will Templates

New Open Delete

Template Name	Jurisdiction	Last Saved	Description
Davidson	ON	11/04/2011	-

Tips
Templates should be used to store global client 'Build-a-Will' settings which could be re-used across multiple client wills. Templates could remove the task of having to rebuild new client wills from scratch.

Create, open or delete templates

06 SAVING A TEMPLATE AS A WILL

1. While in the template, click the **Save As** button at the top of the template page.

Westlaw.CANADA CREATE/EDIT A WILL WILL TEMPLATES HOME PAGE HELP SIGN OUT

Build-a-Will Document: Davidson, L. Document Type: Client Will

ClientID: 02255

Save Save As Clear All Clause List Download

Wills Remaining: 18 Templates Remaining: 30

Build Document

Introductory and Revocation -- Ontario

Ont. a.1 Of jurisdiction (Clause)

Specify name of testator/testatrix
Larry Davidson

Specify City/Town/Municipality etc.
Toronto

Ont. a.2 In contemplation of marriage (Clause)

Ont. a.3 Of property in a named foreign jurisdiction only (suitable for jurisdictions which permit disposition of foreign property by means of secondary will) (Clause)

Ont. a.4 Of all property excluding shares and loan receivables in a private corporation (Clause)

Ont. a.5 Of all property excluding personal articles, shares and loans receivable in a private corporation (Clause)

Ont. a.6 Of shares and loan receivables in a private corporation only (Clause)

Specify name of testator/testatrix
Larry Davidson

Specify City/Town/Municipality etc.

Preview Document

THIS IS THE LAST WILL of me, *Larry Davidson*, of the *Toronto*, Province of Ontario.

I. I REVOKE all former wills and other testamentary dispositions made by me. THIS IS THE LAST WILL of me, Larry Davidson, of the Toronto, Province of Ontario, with respect to the disposition only of all those shares and loans receivable which I may hold at the time of my death in private corporations (hereinafter referred to as my "Secondary Will") and I declare that I have made a separate will disposing of all my other assets (referred to therein as my "Primary Will").

II. I revoke all former wills and testamentary dispositions made by me with the exception of my Primary Will heretofore executed by me this [Date] day of [Month], [Year].

Save As

The **Save as Client Will or Template** page appears.

2. Enter the document name and select the **Client Will** radio button.
3. Enter a **Client ID**.

Client Will

4. Click **Save**.

07 FIRM INFORMATION

Enter your firm's details on the **Firm Information** page. This information will populate the back page of each will.

1. Click **Firm Information** in the left frame of the **Home** page to access the **Firm Information** page.

Firm Information

2. Enter your firm's details into the fields provided.
3. Click **Save**.

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Online: www.carswell.com/email