



## Estates & Trusts Source™

**Estates & Trusts Source is the only all-encompassing online legal workflow solution covering exclusive estates and trusts practitioner requirements.**

### Estate Planning

### Estate Administration

### Estate Litigation

- Streamline and simplify routine tasks like drafting wills, completing forms, correspondence and other documents.
- Access the precedents, fillable forms and extensive checklists you need in just one convenient place.
- *Estate Administration Practice Manuals* for AB, BC, MB, ON, SK, and the Atlantic provinces, all modeled on Thomson Carswell's leading print publication – Armstrong, *Estate Administration: A Solicitor's Reference Manual*.
- Leverage Waters, Widdifield, and Schnurr in a fully-searchable online format.
- Review editorially selected CRA policy documents of special relevance to your practice.
- Refresh on related areas of law with the Canadian Encyclopedic Digest – the definitive Thomson Carswell legal encyclopedia.
- Access an extensive and integrated collection of U.S. estate planning and administration materials.
- Research case law and legislation, including complete estates regulation content for all common law provinces.

[www.westlawecarswell.com](http://www.westlawecarswell.com)

# It's all here — Estates&TrustsSource makes your wishes come true!

The screenshot shows the Westlaw Estates&TrustsSource website interface. The top navigation bar includes 'Estates&TrustsSource', 'Litigator', 'LawSource', 'CriminalSource', and 'FamilySource'. The main content area is divided into several sections: 'Custom Search Templates', 'Browse Tables of Contents', 'Related Links', and 'About Estates&TrustsSource'. The 'Custom Search Templates' section includes links for 'Canadian Abridgment, Digests CED (Selected Titles)', 'Cases', 'Commentary/Practice Manuals', 'CRA Publications (Selected)', 'Forms', 'Legislation', and 'All Estates&TrustsSource Content'. The 'Browse Tables of Contents' section includes links for 'Canadian Abridgment, Digests CED (Selected Titles)', 'Commentary/Practice Manuals', 'CRA Publications (Selected)', 'Legislation', 'Estates&TrustsSource Directories', and 'Getting Started Tips'. The 'Related Links' section includes links for 'taxnet.pro' and 'U.S. Estate Materials'. The 'About Estates&TrustsSource' section includes links for 'Westlaw.ca', 'Estates&TrustsSource', and 'Currency Notes'. The 'Find/KeyCite a Document' section includes search fields for 'Name', 'Jurisdiction', 'Case', 'Title', 'Section', 'Jurisdiction', and 'Document Number'. The 'Estate Planning' section includes search fields for 'Search: Histrop, Estate Planning Precedents', 'Build a Will', and 'Fill-a-Form'. The 'Estate Administration' section includes search fields for 'Checklists', 'Fill-a-Form', and 'Search Practice Manuals'. The 'Estate Litigation' section includes search fields for 'Search: Schnurr, Estate Litigation' and 'Fill-a-Form'. The 'Latest Developments' section includes links for 'Estates&Trusts Courts of Appeal Cases', 'Atlantic Canada', 'Ontario', 'Western', 'Latest SCC Cases', 'CRA', and 'Latest CRA Publications'. The 'Newsletter' section includes a link for 'WebFouls - WebFouls Estates&Trusts newsletter'. The 'Find/KeyCite a Document' section includes search fields for 'Name', 'Jurisdiction', 'Case', 'Title', 'Section', 'Jurisdiction', and 'Document Number'. The 'Estate Planning' section includes search fields for 'Search: Histrop, Estate Planning Precedents', 'Build a Will', and 'Fill-a-Form'. The 'Estate Administration' section includes search fields for 'Checklists', 'Fill-a-Form', and 'Search Practice Manuals'. The 'Estate Litigation' section includes search fields for 'Search: Schnurr, Estate Litigation' and 'Fill-a-Form'. The 'Find/KeyCite a Document' section includes search fields for 'Name', 'Jurisdiction', 'Case', 'Title', 'Section', 'Jurisdiction', and 'Document Number'. The 'Estate Planning' section includes search fields for 'Search: Histrop, Estate Planning Precedents', 'Build a Will', and 'Fill-a-Form'. The 'Estate Administration' section includes search fields for 'Checklists', 'Fill-a-Form', and 'Search Practice Manuals'. The 'Estate Litigation' section includes search fields for 'Search: Schnurr, Estate Litigation' and 'Fill-a-Form'. The 'Find/KeyCite a Document' section includes search fields for 'Name', 'Jurisdiction', 'Case', 'Title', 'Section', 'Jurisdiction', and 'Document Number'.

**1** Workflow-based shortcuts allow you to access materials you use most, quickly and efficiently:

**1a** Search Histrop's highly-regarded *Estate Planning Precedents* and link directly to the state-of-the-art Build-a-Will application. The **Fill-a-Form** link takes you to fillable versions of other estate planning documents, based on the Histrop work.

**1b** Link to comprehensive checklists and search jurisdiction-specific practice manuals. The **Fill-a-Form** link takes you to fillable versions of statutory forms, authored form and letter precedents.

**1c** Search Schnurr's *Estate Litigation* and click on the **Fill-a-Form** link to quickly access fillable statutory forms. Ontario users can access fillable statutory forms incorporating authored precedent pleadings.

**2** Currency Tools section provides one-click access to the following resources:

- Latest estates and trusts cases from the country's Courts of Appeal, updated daily
- A newsletter highlighting legislative and case law developments, with commentary and insight from the ON editor of the *Estates and Trusts Reports*
- New and amended CRA IT Bulletins and other publications, as issued

**3** Custom Search templates allow you to target and search the specific content you are interested in:

- Premium authored commentary
- The **CED (Selected Titles)** link takes you to materials relevant to estates and trusts law for either a quick overview to an area of estates and trusts law or directional signposts to relevant statutes and leading cases
- Step-by-step practice manuals
- An archive of relevant Canada Revenue Agency (CRA) policy documents
- Access case law, case digests and legislation
- Search all content\* allows you to search across all content or selected types of content.

**4** Browse tables of contents for different content types to find exactly what you need:

- Peruse all Abridgment classifications
- All estates-relevant CED titles
- A premium collection of authored commentary (including Waters, Widdifield, Histrop, Schnurr)
- A full range of jurisdiction-specific administration practice manuals

**5** Find and note-up (with *KeyCiteCanada*) case law, legislation or other documents based on name/title, jurisdiction, section or document number or citation.

**6** **taxnet.pro** subscribers can link directly to the taxnet.pro log-in page to do more detailed tax-planning research. taxnet.pro is an online research service offering full coverage of all Canadian taxes including Income Tax, GST and the provincially administered taxes.

**7** Access a vast array of Westlaw® U.S. databases on a pay-per-view basis. You may also subscribe to **Westlaw® Estate Planning Practitioner**, if you have a frequent need to access U.S. materials.

# The power you need to run your practice

## Resources for Estate Planners

- **Histrop** *Estate Planning Precedents* provides access to a highly-regarded, well-drafted, always current, and comprehensive collection of precedents in fully searchable online format
- State-of-the-art **Build-a-Will** application, based on will precedent clauses from **Histrop** *Estate Planning Precedents*, will dramatically reduce the time you spend preparing wills. You will be able to produce auto-populated, superior quality, authoritative, documents in no time!
- **Fillable forms** based on **Histrop** *Estate Planning Precedents* allow you to create other estate planning documents – including Trust deeds, Domestic Contracts, Powers of Attorney, Life Insurance Declarations in mere moments
- Fully-searchable version of **Allen & Allen** *Estate Planning Handbook* provides a concise introduction to the main topics and strategies of estate planning

## Resources for Estate Administrators

- *Estate Administration Practice Manuals* for AB, BC, MB, ON, SK, and the Atlantic provinces, all modeled on the Thomson Carswell leading print publication – **Armstrong**, *Estate Administration: A Solicitor's Reference Manual*.
- All the statutory and authored forms and letters that are used in the process of estate administration are available in fillable format! No more drafting, re-formatting or copying and pasting!

- **Fillable, printable checklists** let you track steps and information so you can be confident nothing is missed or overlooked

## Resources for Estate Litigators

- Desktop access to a fully-searchable version of **Schnurr** *Estate Litigation* – Canada's only highly-authoritative publication specific to estate litigation which includes precedent guides to drafting pleadings
- Fillable statutory forms for every Canadian common law jurisdiction, in court-ready format

## Resources for all Estates and Trusts Practitioners

- Desktop access to a fully searchable version of **Waters et al.**, *Law of Trusts in Canada* – the undisputed authority on trusts law in Canada
- Desktop access to a fully-searchable version of **Theriault ed.**, *Widdifield on Executors and Trustees* – exclusive Thomson Carswell publication providing you with the most complete, authoritative, and long-established definitive guide to the powers and duties of executors and trustees
- Latest CRA publications bring to your attention new or amended Interpretation Bulletins, Information Circulars or Views as they are issued by the CRA. Also included is an archive of all relevant CRA publications of interest to estates practitioners.
- Do you have clients with assets in the U.S.? Only **Estates&TrustsSource** offers single-password access to an extensive collection of U.S. estate materials from Westlaw®

- Stay current with **WeirFoulds Estates&Trusts Newsletter** providing news and commentary on case law and legislative developments, including advance notice of changes on the horizon
- Latest estates and trusts Court of Appeal cases help you stay current with appellate decisions from your jurisdiction. Latest SCC cases bring all SCC decisions to your attention, not just estates and trusts related ones.
- Get a quick overview or introduction to an area of estates law or directional signposts to relevant statutes and leading cases with the **CED Selected Estates and Trusts Titles**
- Access **Case Law** with the Estates and Trusts, Civil Practice, Tax and Family General Headings, drawn from a comprehensive case law database (all reported cases since 1803 and all unreported cases since 1986)
- Access all **Legislation**, including complete estates regulation content for all common law provinces (i.e. all except Quebec)

# Where there's a will, there's a better way

**Westlaw CARSWELL**  
Build-a-Will Document: [test] Document Type: Client Will  
Client ID: [123]  
Save Save As Clear All Check List Download  
Wills Remaining: 18 Templates Remaining: 30

**Build Document**

**Introductory and Revocation**

- a.1 Of City Of Toronto [\[Clause\]](#)
- a.2 Of Ontario [\[Clause\]](#)
- a.3 Of Other Jurisdiction [\[Clause\]](#)
- a.4 In Contemplation of Marriage [\[Clause\]](#)
- a.5 Of Property in a named Foreign Jurisdiction only [\[Clause\]](#)
- a.6 Of all property excluding shares and loan receivables in a private corporation [\[Clause\]](#)

Specify name of testator:  
John Doe  
Specify City/Town/Municipality etc.  
City of Hamilton

- a.7 Of all property excluding personal articles, shares and loans receivable in a private corporation [\[Clause\]](#)
- a.7 Of shares and loan receivables in a private corporation only [\[Clause\]](#)
- a.7a Of personal articles, shares and loans receivable in a private corporation only [\[Clause\]](#)
- a.8 Governing law [\[Clause\]](#)

**RRSP and Life Insurance Designation**

- b.1 RRSP designation to named beneficiary [\[Clause\]](#)

Specify name of beneficiary of RRSP  
Jane Doe

- b.1a RRSP, RRIF, DPSP, pension and annuity designations to named beneficiary [\[Clause\]](#)
- b.1b RRSP designation with alternate designation in favour of issue per stirpes to be held on trusts set out in will [\[Clause\]](#)
- b.1c RRSP designation in favour of issue per stirpes to be held on trusts set out in will [\[Clause\]](#)
- b.1d RRSP designation to named beneficiary, gift over to children, further gift over to issue of a deceased child [\[Clause\]](#)
- b.2 Life Insurance designation to trustees [\[Clause\]](#)

**Preview Document**

THIS IS THE LAST WILL of me, John Doe, of the City of Hamilton, Province of Ontario (hereinafter referred to as my "Primary Will"), with respect to the disposition of all property owned by me at the time of my death with the exception of all those shares and loans receivable which I may own at the time of my death in private corporations, as to which I intend to make a separate will (referred to herein as my "Secondary Will")

I. I REVOKE all former wills and other testamentary dispositions made by me.

II. I HEREBY DESIGNATE, Jane Doe, as my beneficiary under any Registered Retirement Savings Plan which I may own at the time of my death to receive all proceeds payable thereunder upon or as a result of my death. I declare that this shall be a designation within the meaning of the Succession Law Reform Act and, to the extent that any such plans and/or funds are governed by the Insurance Act, that this shall also be a declaration within the meaning of the Insurance Act.

III. I APPOINT James Armstrong, to be the Estate Trustee, Executor and Trustee of this my Will. In the event that James Armstrong predeceases me or is unable or unwilling to act or to continue to act as the Estate Trustee, Executor and Trustee of this my Will, then I appoint (juridically party), to be the Estate Trustee, Executor and Trustee of this my Will in the place and stead of James Armstrong. References to "my Trustees" in this my Will shall include each Estate Trustee, Executor and Trustee of my Will, my estate or any portion thereof who may be acting as such from time to time whether original or substituted and whether one or more.

IV. I GIVE all my property whatsoever situate, including any property over which I may have a general power of appointment, excluding however my personal articles and all those shares and loans receivable which I may hold at the time of my death in private corporations, to my Trustees upon the following trusts, namely:

V. To deliver to my said wife for her own use absolutely if she survives me for a period of thirty (30) days, all articles of personal, domestic and household use or ornament belonging to me at my death, including consumable stores, and all automobiles and accessories thereto then owned by me, provided that if my said wife shall predecease me or shall survive me but die within a period of thirty (30) days of the date of my death, such of the said articles as my Trustees in their absolute discretion deem advisable shall be divided among and delivered to my children, and/or such of the said articles as my Trustees shall determine may be retained in storage for my children and the necessary expenses in connection with such retention shall be paid out of the residue of my estate or out of any share or fund established under this my Will for a child or children of mine and such articles held in storage shall be divided among and delivered to my children in such proportions and at such time or times as my Trustees in their absolute discretion deem advisable. I authorize my Trustees to deliver any such articles to a child of mine and to accept the receipt of such child as a sufficient discharge notwithstanding that such child may be under the age of majority. I declare that my Trustees shall be under no liability in connection with any of the said articles which are retained by my Trustees on behalf of any of my children. Any such articles not delivered to or held in storage for my children shall fall into and form part of the residue of my estate to be dealt with as part thereof.

- State-of-the-art application allows you to create customized Wills, utilizing the precedent clauses from **Histrop Estate Planning Precedents**.
- Accessible from the **Estates&TrustsSource** home page or from anywhere in the online version of **Histrop Estate Planning Precedents**.
- A list of clause types in the left pane, allows you to choose the clauses you are interested in, and see the Will being built in the right pane.
- Clauses may be selected in any order. The application orders and numbers them appropriately.
- The information auto-populates in the document wherever appropriate so you only enter a given piece of information once.
- When complete, the Will can be downloaded onto your computer and saved as a Word document, ready for editing or printing.
- Wills-in-progress can be saved within the application.
- You can create and save up to 30 templates of Wills designed to address recurring situations.
- Build-a-Will allows you to automatically populate a 'back page' for every Will.

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