



Estate Planning & Signing Options During the Covid-19 Pandemic

While we are in a period of social distancing, there is no need to abandon or delay your estate planning efforts. WMCZ Lawyers is pleased to provide the following options to our clients for signing their estate planning documents:

- 1. For clients who are comfortable with leaving their homes, we can facilitate having you sign at our office, with one of our lawyers and one of our staff members witnessing, as follows:**
 - We will set up an advance phone appointment to walk you through the finalized documents and to discuss any outstanding questions that you have.
 - We will then book an appointment for you to attend at our office for signing.
 - We have set up a signing table outside of the entry-way to our office where we will place your documents. Clients who arrive will be able to sign their documents at the signing table, and two witnesses from our office will witness the signatures from our office entry-way. Clients can sign, have the documents witnessed, and ask questions without having to enter our office or physically interact with anyone at our office. We sanitize the signing table before and after each client attends to sign documents.
 - The witnesses from our office will sign the documents after you have signed and departed. We will then make an electronic copy of the documents for our records and either store the originals, or mail them to you along with our reporting letter and invoice, in accordance with your instructions.

- 2. For clients who are not comfortable with leaving their home, but who are comfortable with having two trusted people attend on their home to act as witnesses, we can facilitate having you sign at your home, as follows:**
 - We will prepare an instruction letter which spells out how to execute the documents properly without a lawyer present.
 - We will set up an advance phone appointment to walk you through the finalized documents and the instruction letter, and to discuss any outstanding questions that you have.
 - We will courier the instruction letter and document package to your home.
 - You will execute the documents at your home and in front of two witnesses. Note the following rules on who cannot act as your two witnesses.
 - The following two groups of people cannot be witnesses to your will:
 - People who are receiving an interest in your property by way through your will (i.e. your beneficiaries); and
 - The spouses of your beneficiaries.
 - The following three groups of people cannot be witnesses to your powers of attorney:
 - Your family members;

- A person named as your attorney;
- The family members of a person named as your attorney.

As such, you will need two witnesses who do not fall into these restricted groups above.

- Once documents are executed and witnessed at your home, you will return the executed documents to our office by mail, or personal drop off once you are safe to leave your home, so that we can confirm that they are properly executed. We will then make an electronic copy of the documents for our records and either store the originals, or mail them back to you along with our reporting letter and invoice, in accordance with your instructions.

3. In situations that are urgent, and where neither of the two options above are appropriate or desirable for clients, we can also give instructions on how to write out a very basic “holograph” will, which is a handwritten will requiring no witnesses, for you to have in the interim until the health risks associated with the pandemic have passed.

Feel free to reach out to us to arrange a signing option that will work best for you.

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