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Estate Planning Checklist for Blended Families in British Columbia

A Practical Guide to Protect Everyone You Love

By Tim Louis & Company - Trusted Estate Lawyers in Vancouver

Why This Matters

Blended families face unique estate planning challenges. Whether you're in a second marriage, have stepchildren, or share property with a new partner, this checklist helps you protect your loved ones and avoid legal complications under BC law.

Your Estate Planning Checklist

1. Identify Your Family Structure

- ☐ List all biological children
- ☐ List stepchildren (adopted and non-adopted)
- ☐ Note your current spouse or common-law partner
- ☐ Identify any previous spouses or dependants

2. Appoint Key Roles

- ☐ Choose an executor you trust
- ☐ Assign a guardian for minor children
- ☐ Name a power of attorney for financial decisions
- ☐ Set up a representation agreement for healthcare

3. Draft a Legally Valid Will

- ☐ Include all beneficiaries by name
- ☐ Clearly state asset distribution
- ☐ Avoid vague or verbal promises
- ☐ Consider legal advice to avoid challenges

4. Consider Trust Options

- ☐ Testamentary trust (for minor children or blended families)
- ☐ Spousal trust (to protect current partner while ensuring children inherit later)
- ☐ Review any existing trusts and update as needed

5. Review Joint Assets and Beneficiary Designations

- ☐ Ensure joint property ownership aligns with your wishes
- ☐ Update RRSPs, TFSAs, and life insurance beneficiaries
- ☐ Avoid conflicting instructions between your Will and registered assets

6. Plan for Incapacity

- ☐ Create an enduring power of attorney
- ☐ Draft a representation agreement
- ☐ Ensure your spouse or children have the authority to act on your behalf

7. Communicate with Your Family

- ☐ Explain your intentions to reduce future conflict
- ☐ Share where your Will and documents are stored
- ☐ Keep peace by being open now, not later

8. Review Regularly

- ☐ Update your Will and documents after:
 - A marriage or divorce
 - A new child or grandchild
 - A move or major asset purchase
 - Any significant life change

Need Help? Let's Talk.

Tim Louis & Company has over 40 years of experience helping Vancouver families plan for the future with clarity and care.

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