



MID-YEAR ESTATE REVIEW GUIDE

WHEN FAMILIES GATHER,
WILLS SHOULD TOO.



TIM LOUIS
& COMPANY
BARRISTERS
& SOLICITORS

“Why Updating Your Will Matters This Summer”

Header:

Life changes. So should your will.

Intro Paragraph (left-aligned, human tone):

Whether you’ve welcomed a new grandchild, gone through a divorce, or simply haven't looked at your will in years, summer is the perfect time to make sure your wishes still reflect your reality. Outdated wills can accidentally disinherit loved ones, create conflict between siblings, or leave out a common-law partner entirely.

Visual Element:

Checklist-style infographic (can be developed next) titled:

“Have Any of These Happened This Year?”

Checklist (styled as bold checkboxes for visual clarity):

- ☐ I’ve gotten married, divorced, or entered a new relationship
- ☐ A child or grandchild was born
- ☐ A loved one named in my will passed away
- ☐ I’ve bought or sold property
- ☐ I’ve become part of a blended family
- ☐ My executor or Power of Attorney is no longer available
- ☐ I’ve had a falling out with someone listed in my will
- ☐ A family member was diagnosed with a serious illness
- ☐ I haven’t reviewed my will in 3+ years

“If you checked even one box above, it’s time to revisit your estate plan.”

Tim Louis & Company – Trusted by Vancouver families for over 40 years

<https://willsandprobatelawyer.ca/>

“What to Bring to Your Will Review”

A simple checklist to help you prepare for your estate planning meeting.

We know that updating your will can feel overwhelming — especially when family dynamics are involved. This quick prep list helps you gather what matters most so we can make the process smooth, clear, and conflict-free.

Essentials to Bring:

Document / Detail	Why It Matters
A copy of your existing will	Shows what’s already in place
Names and addresses of key people	Executors, guardians, beneficiaries
List of your children or stepchildren	Especially important in blended families
Notes on recent life changes	E.g., marriage, separation, births, property sales
Medical documents or diagnosis (if relevant)	Supports planning for disability or capacity issues
Questions or concerns you’d like to ask	We’ll address them one by one

“A will isn’t just paperwork — it’s a gift of clarity and peace of mind for your family.”
— Tim Louis

“Blended Families Deserve Clarity”

Second marriages. Stepchildren. Long-time partners.

Your will needs to speak clearly—so your family doesn’t end up in court.

In British Columbia, **stepchildren are not legally considered your heirs** unless you specifically name them in your will. Common-law partners may also be **left out entirely** if the wording isn’t clear.

When families blend, so do expectations. If your will is vague, it can lead to:

- Arguments between biological and stepchildren
- Accusations of favouritism
- Costly **estate litigation**
- Hurt feelings that last for years

What to Double Check in a Blended Family:

Question	Risk if Ignored
Have you listed all children and stepchildren ?	Stepchildren won't inherit by default
Is your partner or spouse clearly named ?	Common-law partners may be excluded
Does your executor understand family dynamics ?	A poor choice can escalate tensions
Are gifts or assets fair and explained ?	"Fair" does not always mean "equal"

"We help blended families build estate plans that protect everyone — not just the loudest voice in the room."

— Tim Louis

"Is Your Executor or Power of Attorney Still the Right Choice?"

Life changes—and so do relationships.

The person you named as your **Executor** or **Power of Attorney (POA)** years ago may no longer be the best fit today.

- Has your executor moved away?
- Have you lost touch with your POA?
- Are they now too elderly, unwell, or unwilling?

These roles are powerful—and come with big responsibilities.

Quick Check: Executor & POA

Role	Questions to Ask	Red Flags
Executor	Are they still local and available?	Moved away, health issues, estranged
Power of Attorney	Do they understand your current wishes?	Lack of trust, poor communication
Backup Choices	Do you have alternates listed?	No one listed, only 1 name given

Legal Tip from Tim Louis:

“One of the biggest estate mistakes I see? Naming someone out of obligation—not capability.”

What to Do:

- Revisit your original documents
- Talk to your executor/POA to confirm they’re still willing
- List 1–2 backups in case your first choice can’t serve
- Ask your lawyer to draft an updated version if needed

“Could Your Will Lead to Conflict?”

Family Conflict Risk Quiz

Even the most loving families can face **serious disputes** after a death—especially when wills are unclear, outdated, or silent about blended families and intentions.

Use this quiz to spot potential warning signs.

Yes/No Conflict Risk Checklist

Question	Yes	No
Have you gone through a major life event (divorce, new relationship, birth, death) since your last will update?	<input type="checkbox"/>	<input type="checkbox"/>
Are some of your children from a previous relationship?	<input type="checkbox"/>	<input type="checkbox"/>
Is someone in your family estranged or difficult to reach?	<input type="checkbox"/>	<input type="checkbox"/>
Do you expect a specific person to be upset with your will?	<input type="checkbox"/>	<input type="checkbox"/>
Is your estate split unequally or without explanation?	<input type="checkbox"/>	<input type="checkbox"/>
Do any family members have financial or dependency issues?	<input type="checkbox"/>	<input type="checkbox"/>
Is there no clear documentation of your wishes beyond your will?	<input type="checkbox"/>	<input type="checkbox"/>

Score Yourself:

- **0–1 Yes:** Low risk. Great job—just make sure your will is up to date.
- **2–3 Yes:** Moderate risk. Strongly consider reviewing your will soon.
- **4+ Yes:** High risk. You should speak with a lawyer right away.

Tim Louis Says:

“We’ve seen small estates tear families apart—not because of the money, but because of the silence.”

Legal Essentials to Avoid Will Disputes”

What every BC family should know to prevent conflict.

1. Be Specific with Beneficiaries

Name each beneficiary clearly—don’t assume relationships or roles (e.g., “my children”) will be interpreted the way you expect.

Avoid ambiguity. Stepchildren don’t inherit unless named.

“General terms like ‘family’ or ‘my children’ often cause the most heartbreak in blended families.”

— **Tim Louis**, Wills & Estates Lawyer

2. Update After Major Life Events

Remarrying? Grandchild born? Executor moved or passed away? Even a small change in your personal life can require a legal update.

Best practice: review your will every 3–5 years.

3. Choose an Executor You Trust (and a Backup)

Your executor is not just a formality—they will carry out your wishes, handle banks, and manage disputes.

They need to be calm, capable, and committed.

“Don’t name someone out of guilt or tradition—choose someone who can handle stress with clarity.”

— **Tim Louis**

4. Communicate Your Choices (Before It’s Too Late)

You don’t need to share every dollar, but giving loved ones some understanding of your decisions reduces surprise—and resentment.

Even a short letter or private conversation can make a big difference.

5. Use a Lawyer—Not Just a Template

Free online templates may be tempting, but they rarely hold up in BC’s complex estate law system—especially with blended families or valuable property.

A professionally prepared will is an investment in your legacy.

“Estate planning is about peace of mind. We write wills that won’t just stand—they’ll stand up in court.”

— **Tim Louis**

“Conversation Starters for Families”

Ease into the tough talks with empathy and clarity.

Talking about wills doesn’t have to be morbid. Use these prompts to start meaningful conversations with:

- Your spouse or partner
- Adult children
- Aging parents

For Spouses & Partners:

- “If something happened tomorrow, do you feel confident about our will?”
- “Have we clearly protected each other and the kids from a legal mess?”

- “Should we name backups in case our executors can’t serve?”

For Aging Parents:

- “Have you reviewed your will recently? Want help checking it together?”
- “Do you have a Power of Attorney or Representation Agreement set up?”
- “Would it bring you peace of mind to get everything organized?”

For Adult Children:

- “We want to make things easier for you—not harder. Can we walk through our will together?”
- “If something changed in our health, do you know who our executor is?”
- “Are there any concerns or questions you’d want us to address now?”

“These conversations are an act of love—not discomfort. The more open we are, the less stress we leave behind.”

— **Tim Louis**

“Estate Review Checklist to Bring to Your Lawyer”

Print and fill this out before your consultation.

Item	Answer / Notes
Date of Last Will	
Location of Original Copy	
Named Executor	
Alternate Executor(s)	
Current Spouse/Partner Name	
All Children (incl. step)	
Any recent life events? (divorce, new child, death, relocation)	
Power of Attorney updated?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Representation Agreement in place?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Notes or Questions to Discuss	

Helpful Tip:

Bring any supporting documents with you—especially medical directives, property titles, and prior wills.

You've Taken the First Step Toward Peace of Mind

Your family matters. Your legacy matters.

Whether you've just begun thinking about your will or are reviewing after many years, this guide puts you in control.

Your next step is simple: **Speak to a lawyer who listens, understands, and has decades of experience helping BC families.**

Speak with Tim Louis & Company



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Quick Links:

- [Book a Wills Appointment](#)
- [Power of Attorney Info](#)
- [Estate Litigation & Conflict Support](#)

"We don't just draft documents. We help people prevent conflict, protect loved ones, and plan with clarity."

— **Tim Louis**, Lawyer, Advocate, Ally for 40+ Years