



**THE LEGAL WILLS ADVANTAGE**  
JUST CLICK. PRINT. SIGN.

# ABOUT LEGAL WILLS

LegalWills.ca is the market leader in online Will services in Canada.

We provide the tools for people to create their own legal Will, Power of Attorney, Living Will (Power of Attorney for Healthcare), and more.

Our mandate is to allow people to create common legal documents in a very easy, convenient, private, secure and cost-effective manner, without the need to pay the high expenses of a lawyer. We go far beyond any do-it-yourself kit or online repository of legal forms and documents. If you wish, all of your legal documents can be stored and maintained by you online, in a completely private and secure portal. This will ensure that you can keep it updated to reflect any changes in your financial or family situation.

## AT-A-GLANCE

- Canada's **only** online Will writing service serving all Provinces and Territories in both official languages
- Over half a million Wills created to date
- 7,000+ free Wills to frontline workers during the pandemic
- 88,000 documents created in 2021
- 22 years in business
- 99% Satisfaction Rate

## OUR STORY

Founded in 2000 by Tim Hewson and Henry Raud, former colleagues at a large tech company, LegalWills has become Canada's leading online estate planning service. Henry, Tim and a group of colleagues had a tradition of Friday after-work drinks. One Friday, the topic of Wills came up when a colleague mentioned that they knew they needed a Will, but didn't have one. It turned out that not one person out of the 15 around the table had a Will. They were a mixed group; some had children, some owned a house, some were married, but what they all had in common was that they all had decent jobs and all knew they needed a Will, yet not one of them had one. It seemed like a broken system, and this got Henry and Tim's wheels turning. They started meeting with a number of lawyers to see if there was potential for a more convenient, affordable solution, and LegalWills was born. Our first Will service went online in 2001, and the service has been expanded and improved every year for the last 20 years.

## ABOUT US

With offices in Canada, the United States and the United Kingdom, LegalWills allows people to create common legal documents in a very easy, convenient, private, secure and cost-effective manner, without the need to pay the high expenses of a lawyer.

We work with local attorneys to develop online legal services that are of the highest quality and in accordance with the laws of the customer's local jurisdiction. We go far beyond any do-it-yourself kit or online repository of legal forms and documents. If you wish, all of your legal documents can be stored and maintained by you online, in a completely private and secure manner. This will ensure that you can keep it updated to reflect any changes in your financial or family situation.



## OUR EXECUTIVE TEAM



**Tim Hewson,**  
*Chief Executive Officer*

Tim Hewson co-founded PartingWishes Inc. in 2000. Since graduating from Loughborough University of Technology in the UK with an Honours degree in Human Factors, he has accumulated over 15 years

experience as a telecommunications consultant and Business Manager for small companies in the UK and in Canada. He also has extensive experience in e-commerce business management for large corporations in Canada and the United States, and has worked as a Product Manager for market leading Call Center and Unified Messaging products.

Tim has over 20 years of experience helping people to write their Will and other estate planning documents. He has been interviewed by many of the major news media outlets including CTV, Global News, The Toronto Star, and other leading Canadian publications. He has also contributed to a number of financial planning books.

Throughout his career, Tim has written extensively on the subject of Will writing and estate planning, and is available to speak on said topics.

To book Tim for an interview, speaking opportunity, or collaboration, inquiries can be sent to: [media@legalwills.ca](mailto:media@legalwills.ca)



## OUR EXECUTIVE TEAM



**Henry Raud,  
President and  
Chief Technology Officer**

Henry Raud has over 20 years experience in the PC, telecommunications and software development industry.

Since graduating with an Honours Computer Science degree from the University of Toronto, he has held several technology and executive management positions in a multinational corporation. During that time, he has been responsible for the successful delivery of many complex software development projects.

Henry joined forces with Tim Hewson in 2000 to form PartingWishes Inc.

As President and CTO, he has full accountability and responsibility for all web site and software development activities, as well as managing the financials of the corporation.



# OUR SERVICES

**LAST WILL & TESTAMENT:** Create a perfect, lawyer-approved legal Will from the comfort of your own home.

**POWER OF ATTORNEY:** Name someone to handle your finances should you ever become incapacitated.

**LIVING WILL:** Specify your health care wishes in case you are ever unable to communicate.

**EXPATRIATE WILL:** If you live outside of Canada, or have assets in the US or UK.

**PET TRUSTS:** We will develop trusts for your furry friend based on the age and forecasted wellness needs. You can name a caregiver and ensure your pet is cared for if you are unable to.

## WHAT THE COMPETITION DOESN'T HAVE

- **MyLifeLocker Executor Tool**  
Users can document their assets and important information in a secure place, which can be printed and stored with the Will or managed entirely online.  
The user can then set people up as **Keyholders™** who will gain access to this information after he or she has passed.
- **MyVault Storage System** Users can upload important files such as photos, documents, instructions on where to find the Will, etc...  
The user can then set up **Keyholders™** to access these files once he or she has passed.

WILL FEATURES	LEGALWILLS	LEADING COMPETITOR
Multiple alternate scenarios	✓	x
Group beneficiaries	✓	x
Staggered payouts for minor trusts	✓	x
Different trust setup for different minors	✓	x
Lifetime interest trusts	✓	x
Text descriptions for a distribution plan	✓	x
Joint Executors	✓	x
Multiple alternate Executors	✓	x
One click Mirror will service for partner/spouse	✓	x
Complementary Wills to cover US or UK assets	✓	x
Optional service to have the Will reviewed by estate planning lawyer	✓	x
Bilingual/available in all provinces & territories in Canada	✓	x



WILL FEATURES	LEGALWILLS	LEADING COMPETITOR
Multiple formats for your final document	✓	x
Two-factor authentication	✓	x
Document print service	✓	x
Bilingual/available in all provinces & territories in Canada	✓	x
<b>ADDITIONAL SERVICES TO SUPPORT ESTATE PLANNING</b>		
<i>MyFuneral service to describe funeral wishes</i>	✓	x
<i>Service to document inventory of assets for your Executor(s) or Power of Attorney</i>	✓	x
<i>Ability to upload files and documents to be accessed by family and loved ones</i>	✓	x
<i>Ability to prepare messages to be distributed after your passing</i>	✓	x



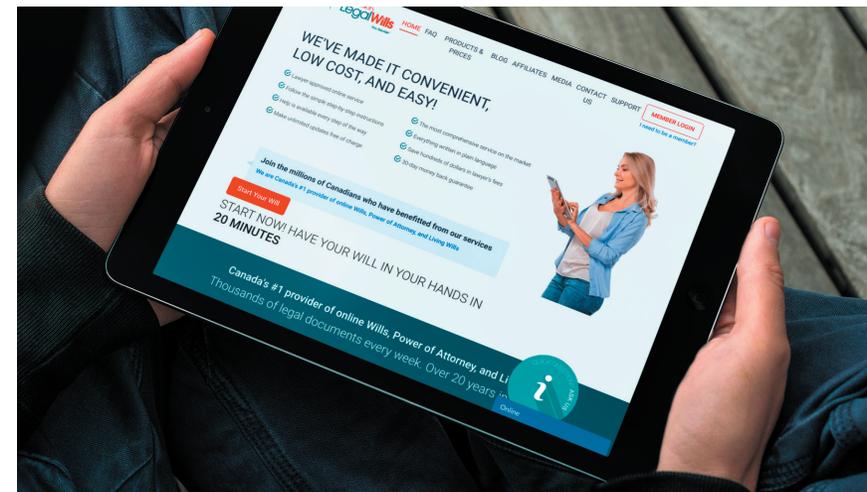
# THE LEGALWILLS ADVANTAGE

LAWYERS	BLANK FORMS	LEGALWILLS
✘ Overpriced	✘ Error-prone	✓ Affordable
✘ Inconvenient	✘ Quickly out-of-date	✓ Convenient
✘ Hard to update	✘ Not specific to jurisdiction	✓ Easy to update
✘ Intimidating process	✘ Too Simple	✓ End product is the same as a lawyer's Will

## FAST FACTS

62% of Canadian adults do not have a Will

12% of Canadian adults have a Will that is out-of-date



# WHY CHOOSE LEGALWILLS?

## LONGEVITY

22 years in business with year over year growth. We are a sustainable business with no reliance on outside funding.

## MARKET LEADER

LegalWills heads the pack of online Will providers by both revenue and volume of Wills created.

## COMPREHENSIVE

The most comprehensive service on the market. Joint executors, complex bequests, lifetime interest trusts, mirror Wills, pet trusts, Expat Wills and flexible trusts for minors, plus our Digital Vault and Lifelocker storage for assets and documents.

## INNOVATIVE TECHNOLOGY

Support for ALL Canadian jurisdictions, white label APIs, e-signature and digital storage, fully bilingual, 2-factor authentication and one click Mirror Wills.

## ON DEMAND REPORTING FOR PARTNERS

Don't wait to find out your commission. Access your portal and pull aggregated reports.

## SOCIAL PROOF

We take pride in our outstanding customer service and reviews. We have 10x the number of 5-star reviews compared to all other competitors - combined.



# PARTNERSHIP OPPORTUNITIES

A large, faint, stylized graphic in the background on the right side of the slide. It depicts a person's silhouette holding a scale of justice. A maple leaf is positioned in the center of the scale's pan. The entire graphic is rendered in a lighter shade of the dark blue background.

**OPTION 1:** Link Service

**OPTION 2:** Embed Service

**OPTION 3:** API Service

## OPTION 1: LINK SERVICE

Simply refer your clients to LegalWills.ca.

### How Does it Work?

You just need a banner link from our team and you are ready to go! All ongoing support is handled by LegalWills.ca at no cost.

### Behind the Scenes

We'll be hard at work creating a custom landing page where your clients will create their Will and accompanying documents after clicking the link you provided. For every sale, you earn a commission.

### Like-Minded Organizations

H&R Block, Big Brothers & Sisters, Ontario Teachers Union, and the Canadian Diabetes Association (...and many more).

## OPTION 2: EMBED SERVICE

Our white label 'embed service' allows you to completely integrate the LegalWills.ca experience onto your website.

### How Does it Work?

We will provide you with a code snippet to insert in the backend of your website. That's it!

### Behind the Scenes

Orders and emails will be processed by LegalWills.ca. Once the initial set-up is complete, we will take care of each and every transaction.

### Like-Minded Organizations

Toronto Humane Society, as well as several insurance brokers, financial advisors and charity organizations.

## OPTION 3: API SERVICE

Functions like the embed service, except all LegalWills branding will be removed and the service can be branded as your own.

### How Does it Work?

Orders are processed, pricing is established and emails are generated by the partner. Services are purchased by the partner directly from LegalWills.ca. This allows partners to offer their own estate planning service directly from their website and determine their own pricing.

### Behind the Scenes

This option requires a slightly more technical implementation. Our company would work more closely with yours to set up the API service. As always, we will be committed to a successful and convenient delivery.

## COMMISSIONS & DISCOUNTS

With Option 1 & 2, you can earn commissions and offer discounts on any of our services.

As a partner, you will receive 30% of each sale; you can choose how to distribute this between your discount offered and your commissions earned.

*I.e. For example, a partner could offer a 10% discount and then earn a 20% commission (on each sale). In another example, you could choose to put the full 30% towards your commission.*

## WHAT WILL PARTNERSHIP COST?

LegalWills.ca handles all associated costs. We incur all legal, licensing, insurance, infrastructure, customer service and product development costs.



# NEW SERVICE: MyClients

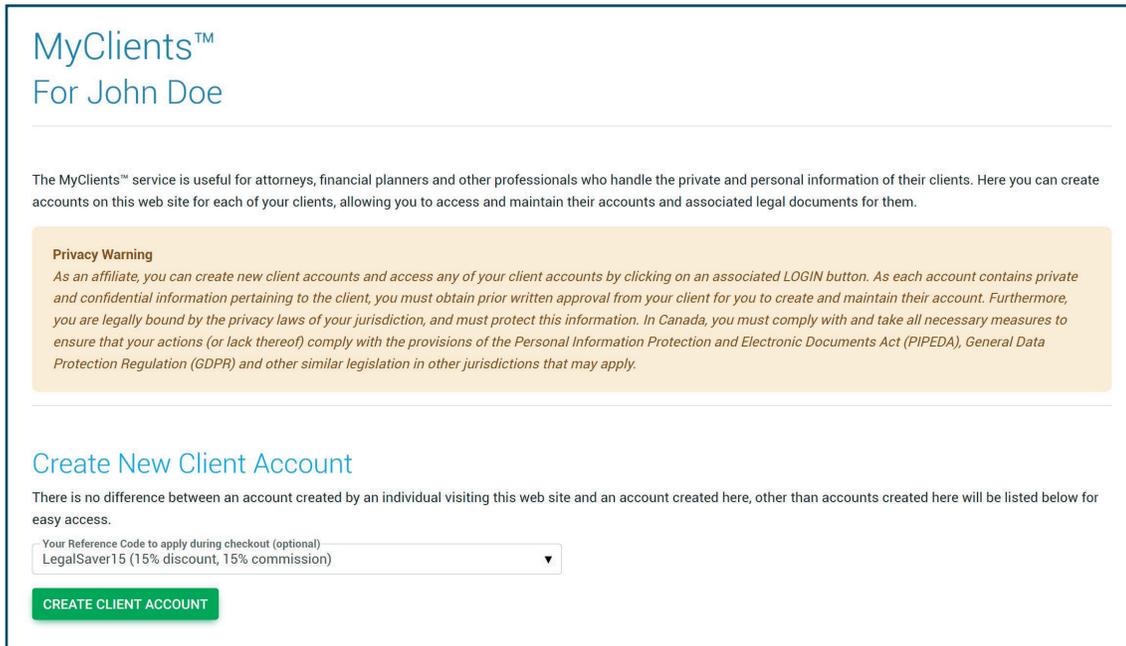
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Our newly launched service, MyClients, allows you to *create* accounts for your clients, and to view them in a simple list while logged in to your affiliate account. Furthermore, it allows you to login to any of the accounts you have created, in order to maintain the account and any associated legal documents.

This is a feature that has been requested by financial planners and legal professionals in the past, so it was specifically designed with attorneys, financial planners, and advisors in mind.

# HOW IT WORKS:

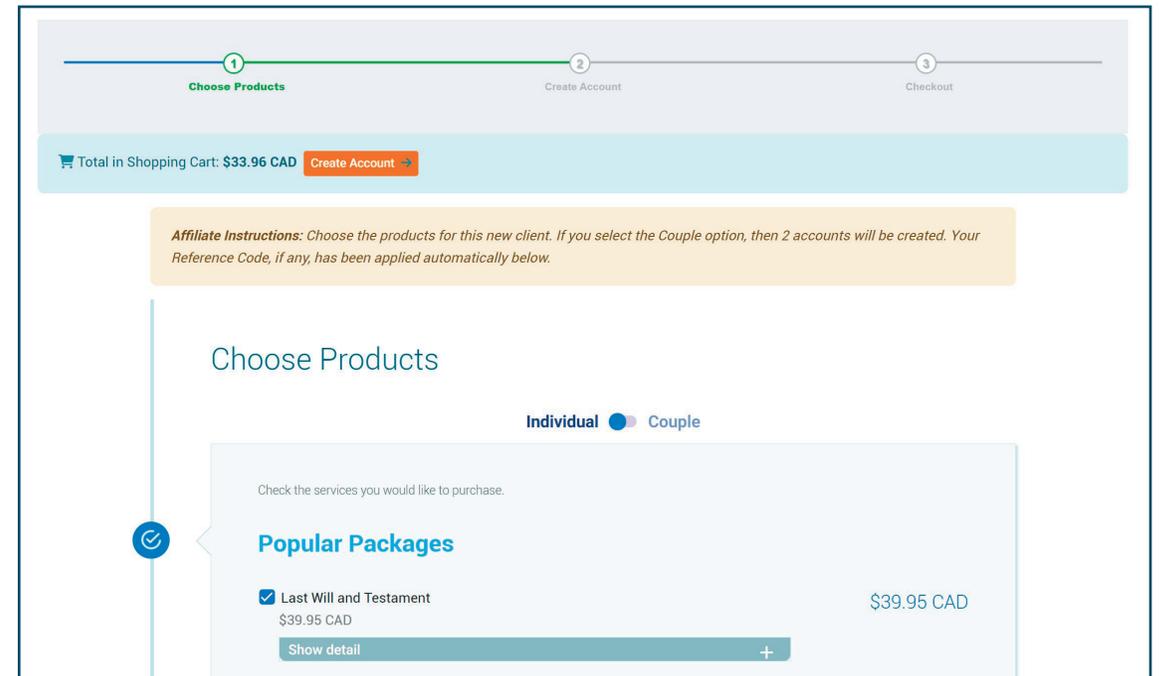
When you access the MyClients service, you will see the following page:



The screenshot shows the MyClients™ interface for John Doe. At the top, it says "MyClients™ For John Doe". Below this is a horizontal line. A paragraph explains the service: "The MyClients™ service is useful for attorneys, financial planners and other professionals who handle the private and personal information of their clients. Here you can create accounts on this web site for each of your clients, allowing you to access and maintain their accounts and associated legal documents for them." A yellow box contains a "Privacy Warning" with text: "As an affiliate, you can create new client accounts and access any of your client accounts by clicking on an associated LOGIN button. As each account contains private and confidential information pertaining to the client, you must obtain prior written approval from your client for you to create and maintain their account. Furthermore, you are legally bound by the privacy laws of your jurisdiction, and must protect this information. In Canada, you must comply with and take all necessary measures to ensure that your actions (or lack thereof) comply with the provisions of the Personal Information Protection and Electronic Documents Act (PIPEDA), General Data Protection Regulation (GDPR) and other similar legislation in other jurisdictions that may apply." Below this is a section titled "Create New Client Account" with a sub-heading "Create New Client Account". A paragraph states: "There is no difference between an account created by an individual visiting this web site and an account created here, other than accounts created here will be listed below for easy access." A dropdown menu shows "Your Reference Code to apply during checkout (optional)" with "LegalSaver15 (15% discount, 15% commission)" selected. A green "CREATE CLIENT ACCOUNT" button is at the bottom.

You will then be able to select which of your affiliate Reference Codes (if any) is automatically applied when creating a new account.

When you click on the “**CREATE CLIENT ACCOUNT**” button, then you will be taken to our regular checkout pages to create the new account, exactly as a new member would be, except we provide some simple instructions to help:



The screenshot shows the checkout process for creating a new client account. At the top, a progress bar has three steps: 1. Choose Products, 2. Create Account, and 3. Checkout. Below the progress bar, a light blue bar shows "Total in Shopping Cart: \$33.96 CAD" and a red "Create Account" button. A yellow box contains "Affiliate Instructions: Choose the products for this new client. If you select the Couple option, then 2 accounts will be created. Your Reference Code, if any, has been applied automatically below." The main section is titled "Choose Products" and has radio buttons for "Individual" (selected) and "Couple". Below this is a box titled "Check the services you would like to purchase." with a "Popular Packages" section. A package "Last Will and Testament" is checked, priced at "\$39.95 CAD", with a "Show detail" button and a plus sign.



After a client account is created, when you return to the MyClients service, you will now see them listed under your “Existing Clients”:

## MyClients™ For John Doe

The MyClients™ service is useful for attorneys, financial planners and other professionals who handle the private and personal information of their clients. Here you can create accounts on this web site for each of your clients, allowing you to access and maintain their accounts and associated legal documents for them.

**Privacy Warning**  
*As an affiliate, you can create new client accounts and access any of your client accounts by clicking on an associated LOGIN button. As each account contains private and confidential information pertaining to the client, you must obtain prior written approval from your client for you to create and maintain their account. Furthermore, you are legally bound by the privacy laws of your jurisdiction, and must protect this information. In Canada, you must comply with and take all necessary measures to ensure that your actions (or lack thereof) comply with the provisions of the Personal Information Protection and Electronic Documents Act (PIPEDA), General Data Protection Regulation (GDPR) and other similar legislation in other jurisdictions that may apply.*

### Create New Client Account

There is no difference between an account created by an individual visiting this web site and an account created here, other than accounts created here will be listed below for easy access.

Your Reference Code to apply during checkout (optional)  
LegalSaver15 (15% discount, 15% commission) ▼

**CREATE CLIENT ACCOUNT**

### Existing Clients

	Name	City	Userid	Account Created	Membership Expires
<b>LOGIN</b>	 <b>Sophie Reynolds</b> sophie@hipix.ca	Toronto, Ontario, Canada	sophie2023	February 5, 2023	February 5, 2024

Each client listed has a “**LOGIN**” button beside it. If you click a **LOGIN** button you will be automatically logged in as the client, so that you can create documents, etc.

When you click “**Log Out**” to exit the clients account, you are returned to the MyClients service.

Behind the scenes, there is no difference between an account created by an individual visiting our website and an account created as an affiliate using the MyClients service, other than accounts you create with this service are tagged to your affiliate ID.



# TESTIMONIALS

*Here's what  
people are saying  
about LegalWills!*

## AT-A-GLANCE

- 4.9-star Google Rating
- 4.9-star Facebook Rating
- 4.7-star Trustpilot Rating
- BBB Rating: A+

## Over 1,000 Google Reviews with a 4.9 star rating

## Over 200 Facebook Reviews with a 4.9 star rating

## Over 1,200 Trustpilot Reviews with a 4.7 star rating

 **Dan Marlow**  
2 reviews  
★★★★★ 2 weeks ago -   
**Positive:** Professionalism, Quality, Responsiveness, Value

With the pandemic and being front line health care workers, my wife and I needed to redo our Wills. We had so many changes, I decided to explore doing them from scratch online and discovered Canadian Legal Wills. In a nutshell, I couldn't be happier with the experience. Convenient, easy, supportive and very cost efficient. Talia was a tremendous resource and I would highly recommend this service to anyone needing to take care of their estate. Thanks for the peace of mind!!

 Like

 **Mike Markle**  
Local Guide · 65 reviews · 5 photos  
★★★★★ 3 months ago -   
Great experience. Quicker, easier and less expensive than a lawyer. The digital access is a nice touch as well with being able to appoint key holders in case something happens. So simple and easy to setup. Would have done this ages ago if I knew how quick and painless it could be. Had my sister set hers up the same day and she had no issues either.

 Like

 **Sebe P**  
★★★★★ 1 hour ago

I just wanted to express my relief and appreciation that this service provided is definitely a very beneficial way to create and safely store your will, specially in these Covid-19 days. Recently had to confront the loss of my better half and wish to state that everything went off smoothly. The document created through this service was valid and accepted by all the regulatory authorities of the land. So for those in doubt, I wish to confirm that you can definitely go ahead and avail yourself of this much needed service giving you the flexibility, safety and cost effectiveness which you do not find anywhere else.

 **Steve Heathcote**  recommends LegalWills.    
February 27 · 

Very easy to use and excellent value for money compared with other online wills that I searched. Full explanations during the step by step process, and great personal customer service when needed. I like their recommendation to use a separate detailed addendum for Executors which can be kept private and easily amended anytime on your computer. They have a host of other services like their notification service, funeral wishes, etc. Very happy with this product.

 **Darlene Nichol** reviewed LegalWills —   
August 1, 2018 · 

Writing your will is never an easy to do and something most people like myself procrastinate to do. I purchased Legal Wills Package on an off with TurboTax. It was the best purchase I have made. It provided detailed step by step instructions and options. I could edit at anytime. It had my funeral decisions and messages included. I am at peace knowing all my wishes are documented

 **Ryan Warnholtz**  recommends LegalWills.   
May 23 at 12:15 PM · 

Legalwills allowed my wife and I to set up our wills quickly and cost effectively. We now have the peace of mind that if something were to happen, we have the documents in place. Thankful for a more cost effective will service, especially in this time.

 **Terence Duddridge**  
1 review · CA  
★★★★★  Verified A day ago

**Just renewed for another 10 years**

Just renewed for another 10 years. Will prepared a couple of years back and because it's filed safely on-line I was able to modify it when needed. Recently completed the Power of Attorney option. Great service package and highly recommended.

 **Charles Lund**  
2 reviews · CA  
★★★★★  Verified 3 days ago

**Excellent service at much less cost than hiring a lawyer.**

Excellent, very easy to follow and appears to have "covered all of the bases". I feel quite confident in using this service instead of hiring a lawyer at much greater expense. Sorry, I do not have any suggestions for improvement.

 **Eileen Beaton**  
1 review · CA  
★★★★★  Verified 4 days ago

**Really pleased and impressed!**

I am really pleased and impressed with it. I found it so so thorough and allows for every minute detail you wish to include. So happy with it and love the fact that it's designed by Canadian lawyers, not an American group where I would be concerned if it was applicable to Canadians.



## What Our Affiliates Are Saying About Us...

*“ Legal Wills provides exceptional service with an excellent product! I am grateful for a partner like Legal Wills - they have helped so many Canadians create quality essential estate planning documents in place very affordably.*

**Barb MacKay**

Estate Planning Specialist



*“ We have been part of the White Label Partner program for a few years, and we and our clients are very impressed with the quality of the products, prices, services and customer support.*

**John Welsh**

Chairman, Canadian Preplanning Council



*“ LegalWills.ca has been a go-to platform to help support our members with creating their own Wills and Testaments. Ensuring their final wishes are prepared in a way they are comfortable with, the easy to navigate platform, and affordable cost allows our members the peace of mind everyone should have when dealing with end-of-life choices.*

**Marnie Drinkwater**

FBC Legal Services



## MEDIA SHOUT OUTS

LegalWills has been featured in:

- CTV News
- CBC News
- Global News
- Toronto Star
- The Globe and Mail
- Financial Post
- The Canadian Press
- And more!

For more information about LegalWill.ca's media appearances, visit: [legalwills.ca/Media](https://legalwills.ca/Media)

*"LegalWills.ca is the most affordable and comprehensive online will service."*

**TORONTO STAR**

Robb Engen, *The Toronto Star*,

*Smart Money & Life*

## CONTACT INFO

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[LegalWills.ca](https://LegalWills.ca)

### Social Media:

 /LegalWills

 /LegalWills

 /LegalWills

 /company/legal-wills

