Alzheimer Society
BRITISH COLUMBIA

October 2011

未雨綢繆計劃清單

本會準備了以下的一份清單，希望能協助被診斷患有腦退化症的人和他們的家人就一些重要事項作出未雨綢繆的準備。

你曾否想過…65

財務及法律上的事宜	有	沒有	在那裡得到更多的資訊
確保你信任的人能使用您的銀行戶口和保險箱	❑	❑	銀行、律師、公證人或信貸机構
訂立永久性授權書	❑	❑	法律教育學會、 卑詩省公共監護和委託人協會、Nidus 資源中心、律師、公證人
訂立和登記第 7 節代表協議書 (如適合您的需要)	❑	❑	Nidus 資源中心、律師、公證人
訂立遺囑(平安書)的執行人	❑	❑	法律教育學會、律師、公証人
為年幼的親屬委任一位監護人	❑	❑	律師或公証人
考慮有沒有需要更改註冊退休儲蓄計劃 RRSP、註冊退休入息基金 RRIF、人壽保險和退休金的受益人人選等等….	❑	❑	財務或投資顧問
準備一張個人珍貴物件的清單並向家人說明你想如何分配，以免日後不必要的爭議	❑	❑	
確保已向稅局提交 T1013表格資料授權另一人代表你去存取稅務資料	❑	❑	加拿大國稅局
申請相關免稅額	❑	❑	加拿大國稅局
擬定個人財務的安排。如果你擁有自己的公司，則需要同時安排業務繼承的事宜	❑	❑	財務顧問
重新考慮各類保險的需要(例如：房屋、人壽、汽車、長期照護保險 等)	❑	❑	律師、公証人或財務顧問
慈善捐款應包括在財產分配之內	❑	❑	律師、公証人、心目中的慈善團體

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醫療和個人事務	有	沒有	在那裡得到更多的資訊
訂立代表協議書	❑	❑	Nidus 資源中心、律師、公證人
向家人和代理人交代您個人在善終護理上的選擇(您可能需要進一步的建議)	❑	❑	Nidus 資源中心、卑詩省公共監護和委託人協會、律師或公證人、當地衛生局、醫師
標籤所有鎖匙，並準備一套備用鑰匙放置於另一固定位置	❑	❑	
與家人商量應何時停止駕駛	❑	❑	家庭醫師
準備一份個人資料檔案，當中應包括以下內容：			
▪ 出生日期及身份証明文件號碼(例如：SIN 卡、醫療卡、駕駛執照等)	❑	❑	
▪ 經由授權書和代表協議書指定財務及法律執行人的姓名	❑	❑	
▪ 醫生、牙醫以及其他任何與你日常生活相關的醫護人員的姓名	❑	❑	
▪ 藥物處方、醫療狀況、過敏症狀	❑	❑	
▪ 家屬和重要親朋的電話號碼	❑	❑	
▪ 授權書、代表協議書和平安書存放之處等等	❑	❑	
▪ 明列資產和保險單資料的清單	❑	❑	
▪ 銀行戶口和其他投資戶口的號碼、保險箱的地方、家居的保安密碼、信用卡號碼和有效日期	❑	❑	
▪ 其他密碼(例如：電腦、電郵、電話留言信箱等)	❑	❑	
選擇護理機構的可能性，並預先探訪	❑	❑	你居住地區所屬的醫療衛生局
計劃喪禮的安排	❑	❑	Funeral Service Association of B.C., Memorial Society of B.C.

The content of the handout is provided as an information resource only and does not provide legal advice. Please consult your lawyer, notary and/or financial advisor to ensure your financial, estate, and health care planning is appropriate for your needs

本明細所列的內容僅作為一般資訊之用途，並不具有任何法律意見。若有需要，請聯絡你的律師、公証人、和 / 或財務顧問。

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READY, SET, PLAN!

This checklist will help you to decide whether you and your family have dealt with some important planning issues.

Have you thought about……

Financial and Legal Affairs	Yes	No	Where to get more information
Ensuring that someone you trust can access your bank account and safety deposit box	❑	❑	Bank or credit union, Lawyer, Notary
Making and registering an *Enduring Power of Attorney*	❑	❑	People's Law School, Public Guardian and Trustee of B.C., Nidus Resource Centre, Lawyer, Notary
Making and registering a *Section 7 Representation Agreement* (if appropriate for your circumstances)	❑	❑	Nidus Resource Centre, Lawyer, Notary
Making and registering a will/review executor(s)	❑	❑	People's Law School, Lawyer, Notary
Appointing a guardian for minor children	❑	❑	Lawyer or Notary
Reviewing beneficiaries in life insurance, RRSP's, RRIF's, pensions etc.	❑	❑	Financial or Investment Advisor
Informing your family of wishes/plans to avoid potential disputes. Making a list of personal items and who you'd like to receive them.	❑	❑	
Completing the *Authorizing or Cancelling a Representative* form for CRA (T1013 - gives permission for someone else to access your tax information)	❑	❑	Canada Revenue Agency
Applying for applicable tax credits	❑	❑	Canada Revenue Agency
Developing a financial plan. If you own a business, develop a business management succession plan	❑	❑	Financial Advisor
Reviewing insurance needs (e.g. house, life, car or long-term care insurance)	❑	❑	Lawyer, Notary or Financial Planner
Including a charitable gift as part of your estate planning	❑	❑	Lawyer, Notary, favourite charity

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Have you thought about……

Health Care and Personal Affairs	**Yes**	**No**	**Where to get more information**
Making and registering a *Representation Agreement*	❑	❑	Nidus Resource Centre, Lawyer, Notary
Communicating end of life care choices to your representative and family (you may want to consider an advance directive)	❑	❑	Nidus Resource Centre, Public Guardian and Trustee of B.C., Lawyer or Notary, local health authority, physician
Labelling your keys, ensure there is a duplicate set in a known location	❑	❑	
Discussing with your family, plans for ceasing driving now/ in the future	❑	❑	Family physician
Preparing a file with your important papers and information such as:			
▪ your birth date and ID numbers (e.g. SIN, MSP, driver’s licence)	❑	❑	
▪ names of financial and legal advisers, executor(s), individual(s) appointed through an *Enduring Power of Attorney* and a *Representation Agreement*	❑	❑	
▪ your health care professionals such as doctor and dentist	❑	❑	
▪ prescriptions, medical conditions, allergies and medications	❑	❑	
▪ phone numbers of family and other important people	❑	❑	
▪ location of *Enduring Power of Attorney, Representation Agreement*, will, etc.	❑	❑	
▪ list of assets, deed(s), insurance policies	❑	❑	
▪ bank account and investment account numbers, location of safety deposit box, security codes for home safe, credit card information	❑	❑	
▪ passwords (e.g. email, computer, voicemail, etc.)	❑	❑	
Reviewing options for residential care and visiting potential sites	❑	❑	Your local health authority
Making a funeral plan	❑	❑	Funeral Service Association of B.C., Memorial Society of B.C.

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