

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	<input type="checkbox"/>	<input type="checkbox"/>	Bank or credit union, Lawyer, Notary
Making and registering an <i>Enduring Power of Attorney</i>	<input type="checkbox"/>	<input type="checkbox"/>	People's Law School, Public Guardian and Trustee of B.C., Nidus Resource Centre, Lawyer, Notary
Making and registering a <i>Section 7 Representation Agreement</i> (if appropriate for your circumstances)	<input type="checkbox"/>	<input type="checkbox"/>	Nidus Resource Centre, Lawyer, Notary
Making and registering a will/review executor(s)	<input type="checkbox"/>	<input type="checkbox"/>	People's Law School, Lawyer, Notary
Appointing a guardian for minor children	<input type="checkbox"/>	<input type="checkbox"/>	Lawyer or Notary
Reviewing beneficiaries in life insurance, RRSP's, RRIF's, pensions etc.	<input type="checkbox"/>	<input type="checkbox"/>	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.	<input type="checkbox"/>	<input type="checkbox"/>	
Completing the <i>Authorizing or Cancelling a Representative</i> form for CRA (T1013 - gives permission for someone else to access your tax information)	<input type="checkbox"/>	<input type="checkbox"/>	Canada Revenue Agency
Applying for applicable tax credits	<input type="checkbox"/>	<input type="checkbox"/>	Canada Revenue Agency
Developing a financial plan. If you own a business, develop a business management succession plan	<input type="checkbox"/>	<input type="checkbox"/>	Financial Advisor
Reviewing insurance needs (e.g. house, life, car or long-term care insurance)	<input type="checkbox"/>	<input type="checkbox"/>	Lawyer, Notary or Financial Planner
Including a charitable gift as part of your estate planning	<input type="checkbox"/>	<input type="checkbox"/>	Lawyer, Notary, favourite charity

Have you thought about.....

Health Care and Personal Affairs	Yes	No	Where to get more information
Making and registering a <i>Representation Agreement</i>	<input type="checkbox"/>	<input type="checkbox"/>	Nidus Resource Centre, Lawyer, Notary
Communicating end of life care choices to your representative and family (you may want to consider an advance directive)	<input type="checkbox"/>	<input type="checkbox"/>	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	<input type="checkbox"/>	<input type="checkbox"/>	
Discussing with your family, plans for ceasing driving now/ in the future	<input type="checkbox"/>	<input type="checkbox"/>	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)	<input type="checkbox"/>	<input type="checkbox"/>	
▪ names of financial and legal advisers, executor(s), individual(s) appointed through an <i>Enduring Power of Attorney</i> and a <i>Representation Agreement</i>	<input type="checkbox"/>	<input type="checkbox"/>	
▪ your health care professionals such as doctor and dentist	<input type="checkbox"/>	<input type="checkbox"/>	
▪ prescriptions, medical conditions, allergies and medications	<input type="checkbox"/>	<input type="checkbox"/>	
▪ phone numbers of family and other important people	<input type="checkbox"/>	<input type="checkbox"/>	
▪ location of <i>Enduring Power of Attorney</i> , <i>Representation Agreement</i> , will, etc.	<input type="checkbox"/>	<input type="checkbox"/>	
▪ list of assets, deed(s), insurance policies	<input type="checkbox"/>	<input type="checkbox"/>	
▪ bank account and investment account numbers, location of safety deposit box, security codes for home safe, credit card information	<input type="checkbox"/>	<input type="checkbox"/>	
▪ passwords (e.g. email, computer, voicemail, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	
Reviewing options for residential care and visiting potential sites	<input type="checkbox"/>	<input type="checkbox"/>	Your local health authority
Making a funeral plan	<input type="checkbox"/>	<input type="checkbox"/>	Funeral Service Association of B.C., Memorial Society of B.C.