Alzheimer Society
BRITISH COLUMBIA

October 2011

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

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.

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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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