

Alzheimer Society
P E E L

WHAT'S BEHIND YOUR LEGACY?



YOUR ESTATE PLANNER
HONOUR THE MOMENTS THAT SHAPED YOU
WITH YOUR ESTATE PLAN



- **A CHANCE TO HONOUR YOUR VALUES.**
- **A WAY TO CARRY YOUR CARE FORWARD.**
- **A PLAN TO CREATE YOUR LEGACY.**

Thank you for taking the time to prepare for the creation of your Will!

This Planner holds everything you and your legal advisor need to prepare a legally sound and complete Will.

But your estate planning experience can be about more than your finances. It can be about the care you've given, the people who've shaped you, and the values you want to carry forward.

In the What's Behind Your Legacy? In this section of this Planner, we encourage you to reflect on your life experiences and the story behind your legacy.

Why is making your Will important?

It is essential to understand the power of doing your Will and Powers of Attorney for Personal Care and Property.

Completing these documents ensures that you protect your family now and in the future, protect your assets, and support the Alzheimer Society Peel in the fight for the dignity of everyone living with dementia. A gift in your Will to a registered charity like the Alzheimer Society can save you and your family taxes as well as leave a legacy of support.

Here at the Alzheimer Society Peel, our vision is to create a world without Alzheimer's disease and other dementias. We want families to be prepared and ready for the future, no matter what happens.

Act now

Planning is an act of care. Complete this document. Call your lawyer or an estate planning expert to discuss how you can protect what is important to you. And please consider including a gift in your Will to help us remove the social barriers to dementia care.

For more information, see our Estate Planner Guide or contact a member of our team.

Alzheimer Society Peel

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Our challenges are formidable

Dementia

Alzheimer's disease and other dementias steal time and memories from more than three-quarters of a million Canadians. We need your help now!

- Around 10% of Canadians aged 65 and older live with dementia, and the risk increases significantly with age. Most people living with dementia have at least one unpaid caregiver, with staggering emotional and financial costs.
- In 2011, the first wave of the baby boomers turned 65. Between 2 and 10% of all cases of dementia start before the age of 65. The risk of dementia doubles every five years after age 65, with a significant increase in prevalence among those 85+.
- Women represent 72% of Canadians living with Alzheimer's disease. That occurs because women live longer than men, and age is the biggest risk factor!

Procrastination

If you haven't made a Will, why not? If you have made a Will, when was the last time you reviewed it to see if it needed updates?

- More than 70% of Canadians do not have Powers of Attorney for Personal Care and Property.
- More than 50% of Canadians do not have a Will.

With a Will, YOU decide how you want to protect what's important to you, who shares in your lifetime's worth of assets, and how you wish to be remembered. Act now

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MY PERSONAL INFORMATION

This information is private and confidential. Please keep it in a safe space and consider it part of your estate planning documents along with your Will and Power of Attorney.

Date this information was prepared:

- Do you have a Will? Yes No Date: _____ Location: _____
- Recent Codicil Yes No Date: _____ Location: _____
- Who has access to your current Will? _____

Your Full Name: _____

Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Home Telephone: _____ Work Telephone: _____
Birth Date: _____ Place of Birth: _____
Citizenship: _____ SIN #: _____
Occupation: _____ Employer: _____

Marital Status:

Single Married Widowed Divorced Common-Law Other: _____

- Is there a marriage contract or pre-nuptial agreement? Yes No
- Date & place of marriage: _____
- Previous marriage: (Name/Date) _____
- Divorce granted: (Date/Location of papers) _____

Name of My Spouse: _____

Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Telephone: _____
Birth Date: _____ Place of Birth: _____

My Children

- Do you have children? Yes No
- Are any of your children adopted? Yes No

Name, relation (i.e. son or daughter), address and birth date of children to be named in your Will:

1. Name: _____ Relation: _____ Birth Date: _____
Address: _____
2. Name: _____ Relation: _____ Birth Date: _____
Address: _____
3. Name: _____ Relation: _____ Birth Date: _____
Address: _____

My Relatives

Name, relation (i.e. aunt or cousin), address and birth date of immediate relatives to be named in my Will:

1. Name: _____ Relation: _____ Birth Date: _____
Address: _____

2. Name: _____ Relation: _____ Birth Date: _____
Address: _____

3. Name: _____ Relation: _____ Birth Date: _____
Address: _____

4. Name: _____ Relation: _____ Birth Date: _____
Address: _____

Other Relatives

Name, relation (i.e. neice or nephew), address and birth date of immediate relatives to be named in my Will:

1. Name: _____ Relation: _____ Birth Date: _____
Address: _____

2. Name: _____ Relation: _____ Birth Date: _____
Address: _____

3. Name: _____ Relation: _____ Birth Date: _____
Address: _____

4. Name: _____ Relation: _____ Birth Date: _____
Address: _____

Friends, Business Partners, Colleagues

Name, relation (i.e. friend or colleague), address and birth date of immediate relatives to be named in my Will:

1. Name: _____ Relation: _____ Birth Date: _____
Address: _____

2. Name: _____ Relation: _____ Birth Date: _____
Address: _____

3. Name: _____ Relation: _____ Birth Date: _____
Address: _____

4. Name: _____ Relation: _____ Birth Date: _____
Address: _____

My Child Guardians

If you have underage children, it is crucial that you name a child guardian in your Will. You should name a guardian and an alternate guardian you trust with your child's care. Always discuss guardianship with the potential guardians before naming them in your Will.

Child Guardian

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Home Telephone: _____ Work Telephone: _____

Alternate Child Guardian

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Home Telephone: _____ Work Telephone: _____

My Pets

Many people have beloved pets. If you have pets, you should name someone you trust to care for them in the event you predecease them.

1. Name _____ Age: _____ Breed: _____
2. Name _____ Age: _____ Breed: _____

Pet Guardian

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Home Telephone: _____ Work Telephone: _____

Veterinarian Clinic

Clinic Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Clinic Telephone: _____ Veterinarian Name: _____

My Personal Representatives

Your choices of Executor/Trustee and alternate are important. Your Executor/Trustee should be a mature person capable of conducting business affairs. Your partner, a relative or a friend could be a possible choice. As an Executor/ Trustee could predecease you or be unable to serve, it's wise to choose an alternate. Trust companies can also act as Executor/Trustee and will always be able to serve in that capacity.

Executor

Name: _____

Address: _____

City/Town: _____

Home Telephone: _____

Suite: _____

Province: _____ Postal Code: _____

Work Telephone: _____

Co-Executor

Name: _____

Address: _____

City/Town: _____

Home Telephone: _____

Suite: _____

Province: _____ Postal Code: _____

Work Telephone: _____

Alternate

Name: _____

Address: _____

City/Town: _____

Home Telephone: _____

Suite: _____

Province: _____ Postal Code: _____

Work Telephone: _____

Power of Attorney – Personal Care

Name: _____

Address: _____

City/Town: _____

Home Telephone: _____

Suite: _____

Province: _____ Postal Code: _____

Work Telephone: _____

Power of Attorney – Property

Name: _____

Address: _____

City/Town: _____

Home Telephone: _____

Suite: _____

Province: _____ Postal Code: _____

Work Telephone: _____

My Important Contacts

Several people or institutions may maintain records important in settling your estate. Many law firms have facilities for storing original Wills. Your Executor/Trustee will need access to your legal, financial and tax records. To ensure the smooth settlement of your estate, list the following information, plus any other information you deem relevant to your estate.

Employer

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Telephone: _____

Physician

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Work Telephone: _____

Life Insurance Firm

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Telephone: _____ Email: _____

Legal Firm

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Telephone: _____ Email: _____

Accounting Firm

Name: _____
Address: _____ Suite: _____
City/Town: _____ Province: _____ Postal Code: _____
Telephone: _____ Email: _____

Investment Firm

Name: _____

Address: _____

Suite: _____

City/Town: _____

Province: _____ Postal Code: _____

Telephone: _____

Email: _____

Funeral Home

Name: _____

Address: _____

Suite: _____

City/Town:

Province: _____ Postal Code: _____

Telephone:

Email: _____

Notes and Comments

My Important Documents

It is very important that your Executor/Trustee knows where your important legal and financial documents are located. An easy way to keep all the financial institutions, account numbers, etc. in one place is to create a binder. Every time a new statement comes in, replace the old one. Policies can be kept in plastic sleeves. Ensure you keep the binder in a locked fireproof location.

Location of my safety deposit box (Financial Institution):

Address: _____

Box Number: _____

Key Location: _____

Location of my important documents:

Original Will: _____

My Executor has a copy of my Will: Yes No

Power of Attorney for Personal Care: _____

Power of Attorney for Property: _____

Trust Agreements: _____

I have made duplicate copies of important documents. Copies are stored at the following location:

Birth Certificate: _____

Passport: _____

Social Insurance Certificate: _____

Health Card: _____

Prenuptial Agreement: _____

Marriage Certificate: _____

Divorce Papers: _____

Adoption Papers: _____

Burial Instructions & Cemetery Deed: _____

Tax Records: _____

Life Insurance: _____

Home Insurance: _____

Vehicle Insurance: _____

Employee Benefits, Retirement and Pension Plans: _____

Military Records and Pension Papers: _____

Chequing and Savings Account Statements/Books: _____

Canada Savings/Premium Bonds Investment & Mutual Fund Accounts: _____

Retirement Savings/Income Accounts: _____

Tax-Free Savings Accounts: _____

Educational Fund Accounts: _____

Real Estate Titles and Deeds: _____

Rental Property Lease Agreements: _____

Mortgage Statements: _____

Home Equity: _____

Loan Statements: _____

Credit Card Statements: _____

Vehicle Loan Statements: _____

Personal Loan Statements: _____

Safe Combination: _____

WHAT'S BEHIND YOUR LEGACY?



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My Financial Information

To ensure the smooth settlement of your estate, list the following information, plus any other information you believe is relevant to your estate.

Unregistered Accounts

Institution	Type of Account	Account Number	Sole or Joint Owner

Registered Accounts

Institution	Type of Account	Account Number	Beneficiary

Life Insurance Policies

Institution	Type of Account	Account Number	Beneficiary

Pension Income (pension plans, annuities, profit sharing plans)

Institution	Account Number	Beneficiary

Real Estate (primary residence, vacation home, rental property, farm)

Type of Property	Location	Sole or Joint Owner

Collections (gems, precious metals, art, vehicles, furnishings, collectibles)

Type	Location	Sole or Joint Owner

Business Interests

Name of Business	Sole or Joint Owner	Location	% of Interest

Personal Use (cars, trucks, boats, airplanes, furnishings, clothing, jewelry)

Type of Property	Location	Sole or Joint Owner

Liabilities (outstanding bills, credit cards, auto loans, personal loans, student loans, business loans, mortgages)

Type	Owned by You	Jointly Owned

My Estate Distribution

Your Will does not need to detail every item for distribution in your estate. However, if you wish to give someone a specific item or sum of money, or if there has been a change in your wishes outlined in a previous Will, make your wishes known and have your existing Will amended.

In distributing money, consider dividing it by percentages, rather than in fixed amounts, to take into account changes in the size of your estate. For possessions, consider listing some specific items that are valuable or have sentimental meaning, and then designate one individual to receive "the balance of my personal possessions." Please note that giving charities gifts of publicly traded securities and mutual funds through your Will gives your estate significant tax advantages.

Personal Use (cars, trucks, boats, airplanes, furnishings, clothing, jewelry)

Person or Charitable Organization	Specific amount of money or description of item to be distributed

In your Will, you may divide the residue of your estate (what's left over after specific bequests) among people and charitable organizations that you specify. Note your intentions, or changes, below:

Person or Charitable Organization	% Residue of my estate

PLEASE NOTE: Please seek expert advice. Drafting your Will is a task you should give to an expert who is familiar with laws and procedures in the province in which you reside.

My Final Farewell

Everyone, regardless of health status or age, can plan and prepare for their funeral. You can include anything you want in your final farewell. You must complete and share your plan if you want your wishes carried out.

A funeral or memorial generally combines elements of both mourning and celebration. Your family and friends will gather to simultaneously share their sorrow and celebrate your life.

It is common for a close family member to take on the role of memorial or funeral planner. He or she will be asked many questions that you could have easily answered before passing. Many of the questions asked may leave your family members a bit perplexed. Some may even get emotionally stressed.

Consider that your funeral or memorial service could be an opportunity for you to say a final farewell. And you get to choose how your family and friends experience that goodbye. If you take control of the planning, it helps ensure that your wishes are carried out. It also relieves your family and friends of a burden at a time of grief and stress.

By reflecting on the following questions, you can help your family members with your final farewell.

Things to consider after the Remembrance Service

Do you want to donate your body? Yes No

- You might wish to donate your entire body for medical education (also referred to as "anatomical studies") or scientific research, or part of your body for transplant. But even if you wish to donate your entire body, it might be refused — for any number of reasons. If it is your desire to further medical research, find out now if your remains will be accepted and tell your loved ones of your wishes.

Do you prefer cremation or earth burial?

- How do you want your physical remains disposed of? Your choices are cremation or burial.
- Decide and make your wishes known to your family. Write it down to avoid any misunderstanding.
- Go a step further and make the arrangements. This is a real plus and will take the financial strain and emotional stress off of your loved ones. Unless pre-arranged, the legal responsibility for these decisions lies with your Executor.

My wishes are:

- An immediate cremation with no memorial service
- An immediate cremation, followed by a memorial service – on the same day, or later
- A funeral service with my body present in a casket, followed by cremation
- An immediate earth burial with a graveside service
- An immediate earth burial, followed by a memorial service – on the same day or later
- A "traditional" funeral service – with my embalmed body present in a casket, whether open or closed, followed by earth burial.

- If you choose to bury your body or ashes, where is it to be?
- What kind of memorial (marker or tombstone) do you want on your grave?
- Is there an inspirational message that you would like engraved on your urn or marker?
- Do you have a funeral budget? Yes No
- How much can you afford to spend – or how much are you willing to spend – on your funeral?
- My memorial or funeral arrangements have been made: Yes No
- Name of Funeral Home: _____
- Address: _____
- Do you want a farewell remembrance service? Yes No
- If yes, where do you want the service held? _____
- Is the service formal or informal? Formal Informal
- What do you want to happen at the service?
- For example, if you love animals, would you like your family and friends to bring their dogs?
- What are your favourite flowers?
- Would you like them at your service? How would you like them displayed?
- What are your favourite songs?
- Would you like any of them played at your service? Yes No
- Do you have a favourite scene in a movie? Something that inspired and moved you?
- Consider requesting a video clip of that scene and have it played at your service.
- Do you have favourite quotes, poems or words of inspiration from a book that inspired you?
- Would you like to share these passages at your service? Yes No
- Would you like a token of remembrance given out at your farewell service?
- For example, a tree sapling?
- Do you want remembrance cards and envelopes available for family and friends who wish to make memorial donations to your favourite charity? Yes No
- This is a gesture many may wish to make to honour your life. _____
- What charity would you like to benefit? _____

What's Behind Your Legacy?

This section aims to capture what's behind your legacy and honour your life. The moments, values, and relationships that made you who you are. These reflections can become part of the story you leave behind.

You probably won't complete it all in one go, so make a note of the thoughts you have and return to it after some reflection.

When you reflect, view your life as a timeline of your unique experiences.

Your memorable moments may be complex or straightforward, joyful or sad. Some may have been formative and deposited in the human collective consciousness, like the fall of the Berlin Wall or the moonwalk.

My Outer World

Your favourite memories may be linked to your sense of belonging and relationships, such as with family, friends, teachers, colleagues, neighbours, etc. Or they may be those times of accomplishment, taking a stand for something important, a commitment fulfilled, your quest for continuous learning, or to excel in an area of interest. Your favourite memories may also be linked to travel, culture and world awareness. Did you yearn to travel and see other cultures beyond your borders? Or your fondest and happiest memories may be linked to your five senses, a beautiful image or work of art, a great book that inspired you, a moving piece of music, a favourite scent, the taste of your favourite meal, or the feel of your loved one's hand in yours.

People, activities, images, these are your memories, your experiences, who you are.

Reflect and enjoy

My Inner World

For many people, the spiritual self is rarely considered. When considering your life's legacy, you may wish to reflect on how you feel about yourself and your place in the world, your beliefs and values, and your sense of inner calm or inner conflict. Who are you in the world? How would you describe yourself? How have you grown over the years? How do you want to be remembered? What do you want your life to stand for?

My Eulogy

Who knows you and your life better than yourself? Writing your own eulogy gives your listeners a snapshot of your life from your perspective. You can highlight experiences that many of your family and friends may not know about or even remember. However, those experiences formed who you are today. Imagine your final words being read, with everyone knowing you wrote them as a final message.

Write your eulogy here. If you do not wish to write your own eulogy, whom do you choose to deliver your eulogy?



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