

Alzheimer Society

BRANT HALDIMAND NORFOLK
HAMILTON HALTON

**BE A
SUPER HERO!**

Protect your
Family & Assets

Save
Taxes

SAVE THE
WORLD FROM
DEMENTIA!

ESTATE PLANNER

Our foes are formidable!

Foe #1 – 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!

- After the age of 65, **1 in ten** Canadians develop dementia.
- 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 for dementia doubles every five years after age 65.
- 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!

Foe #2 – Procrastination

If you haven't made a Will, why not? If you have made a Will, when was the last time you updated it?

- More than **75%** of Canadians do not have Powers of Attorney for Personal Care and Property.
- More than **62%** 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! And be OUR Super Hero.*





Thank you For taking the First step in becoming our Super Hero by taking the time to prepare For the creation of your Will!

This Planner holds everything you and your *Super Hero* sidekick — a legal advisor — need to unleash the power of a legally sound and complete Will. It is designed to gather, prioritize and organize the many items that's your Executor will need to complete your estate in a timely manner. Taking the time to gather and complete this planner will decrease the stress your Executor may encounter while grieving and trying to find important documents.

But your estate planning experience can be about more than your finances. In the *Memory Bank* section of this Planner, we encourage you to reflect on your life experiences and write about your life and the way you want to be remembered.

What makes a *Super Hero*?

It's someone who has the courage to protect what's important, who puts the needs of others ahead of themselves and strives to make the world a better place. *Super Heroes* like you understand the power of doing your Will and Powers of Attorney for Personal Care and Property.

In our opinion, completing these documents makes you a Super Hero. Why? Because you want to protect your family now and in the future; protect your assets and support the Alzheimer Society in the fight for good. You aren't afraid to take action to make it happen.

But nobody said *Super Heroes* need be completely selfless. A gift in your Will to a registered charity like the Alzheimer Society can save you and your family taxes too.

Super Heroes strive to make the world a better place. Here at the Alzheimer Society, we want 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!

There is no better time than today to become a *Super Hero*! Complete this document. Call your lawyer to discuss how you can protect what is important to you. And please consider including a gift in your Will to the Alzheimer Society to help us fight dementia!

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

Alzheimer Society Foundation of Brant,
Haldimand Norfolk, Hamilton Halton
645 Norfolk Street North, Simcoe, ON N3Y 3R2
Tel: 1-800-565-4614

Email: donations@alzda.ca

My Personal Information

Date this information was prepared: _____

Do you have a Will? Yes No Date signed: _____ Location: _____

Recent Codicil: Yes No Date signed: _____ 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: _____ Social Insurance Number: _____

Occupation: _____ Employer: _____

Do you live part of the year outside of Canada? Yes No If yes, location: _____

Marital Status:

Single Married Widowed Separated Divorced Common-Law

Is there a marriage contract, domestic or pre-nuptial agreement? Yes No

Date & place of marriage: _____

Previous marriage: (Name/Date) _____

Divorce granted: (Date/Location of papers) _____

Maiden Name: _____

Name of My Spouse/Partner: _____

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Home Telephone: _____ Work Telephone: _____

Birth Date: _____ Place of Birth: _____

My Children:

Do you have children? Yes No

Are any of your children adopted? Yes No

Are any of your children disabled? Yes No

Name, son/daughter, address and birth date of children to be named in your Will:

Four horizontal lines for writing names and details of children.

Relatives: Name, address and birth date of immediate relatives to be named in my Will:

Mother: _____

Father: _____

Brothers: _____

Sisters: _____

Other Relatives: Name, address and birth date of other relatives (i.e. grandchildren) to be named in my Will:

Four horizontal lines for writing names and details of other relatives.

Friends, Business Partners, Colleagues: Name, address, birth date of friends to be named in my Will:

Three horizontal lines for writing names and details of friends.

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 with their care in the event you predecease your pets.

Pet Name: _____ Breed: _____ Age: _____
Pet Name: _____ Breed: _____ Age: _____

Pet Guardian Name:

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

Veterinarian Clinic:

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

My Personal Representatives

Your choices of an 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 possible choices. As an Executor/Trustee could predecease you or be unable to serve, it's wise to choose an alternate Law firms and Trust companies can also act as Executor/Trustee and will always be able to serve.

Executor's Name: _____

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Home Telephone: _____ Work Telephone: _____

.....

Co-Executor's Name: _____

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Home Telephone: _____ Work Telephone: _____

.....

Alternate Name:

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Home Telephone: _____ Work Telephone: _____

.....

Power of Attorney – Personal Care Name (s):

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Telephone: _____ Fax: _____

.....

Power of Attorney – Property Name (s):

Address: _____ Suite: _____

City/Town: _____ Province: _____ Postal Code: _____

Telephone: _____ Fax: _____

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 as relevant to your estate.

Employer: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Physician: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Life Insurance Firm: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Legal Firm: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Accounting Firm: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Bank: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Investment Firm: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

Funeral Home: _____ **Contact:** _____
Address: _____ **Suite:** _____
City/Town: _____ **Province:** _____ **Postal Code:** _____
Telephone: _____ **Email:** _____

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 fire-proof 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 _____

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 – (CHEQUING, SAVINGS, TERM DEPOSITS, MONEY MARKET, MUTUAL FUNDS, STOCKS, BONDS)

Institution	Type of Account	Account Number	Sole or Joint Owner

REGISTERED ACCOUNTS – (TAX FREE SAVINGS ACCOUNT, RRSP, RRIF)

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 of Property	Location	Sole or Joint Owner

BUSINESS INTERESTS – (CORPORATE, PARTNERSHIP, PROPRIETORSHIP)

Name of Business	Location	Sole Owner/Joint	% Interest

PERSONAL USE – (CARS, TRUCKS, BOATS, AIRPLANES, FURNISHINGS, CLOTHING, JEWELRY)

Type of Property	Location	Sole or Joint Owner

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.

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, RRSPs/RRIFs, life insurance policies and gifts through your Will gives your estate significant tax advantages.

PERSON OR CHARITABLE ORGANIZATION	SPECIFIC AMOUNT OF MONEY OR DESCRIPTION OF ITEM TO BE DISTRIBUTED
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

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 (PERCENTAGE)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	

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 your 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 that goodbye is experienced by your family and friends. If you take control of the planning it helps ensure that your wishes are carried out. It also removes a burden from your family and friends 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 earth burial. Decide and make your wishes known to your family. Write it down so there is no 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.

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.

My Final Farewell

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? What do you want to happen at the service? Is the service formal or informal? 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?

My Final Farewell

What are your favourite songs? Would you like any of them played at your service?

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?

Would you like a token of remembrance given out at your farewell service? For example, a tree sapling?

Do you want remembrance cards made available, as well as envelopes for family and friends who wish to make memorial donations to your favourite charity? This is a gesture that many may wish to make in order to honour your life. What charity would you like to benefit?

My Memory Bank

The aim of the *Memory Bank* is to capture your favourite memories. You probably won't complete it all in one go, so make a note of the thoughts you have and return to it after a time of reflection.

When you reflect, look at your life as a timeline filled with your unique and distinctive experiences. Your memorable moments may be simple or complex, 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.

Horizontal lines for writing notes.



Horizontal lines for writing notes, positioned to the right of the speech bubble graphic.

Alzheimer
Society

SUPER HEROES

**SAVE THE WORLD FROM DEMENTIA
JOIN OUR LEAGUE NOW!**

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Tel: 1-800-565-4614 • donations@alzda.ca • www.alzda.ca

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