

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](mailto: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:

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

Mother: 

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Father: 

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Brothers: 

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Sisters: 

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

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

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## 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: \_\_\_\_\_

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### 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: \_\_\_\_\_

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### Pet Guardian Name:

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

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### 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 \_\_\_\_\_

o 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

**LIABILITIES – (OUTSTANDING BILLS, CREDIT CARDS, AUTO LOANS, PERSONAL LOANS, STUDENT LOANS, BUSINESS LOANS, MORTGAGES)**

[illegible]

## Online passwords:

[illegible]

## 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?

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What kind of memorial (marker or tombstone) do you want on your grave?

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Is there an inspirational message that you would like engraved on your urn or marker?

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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?

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What are your favourite flowers? Would you like them at your service? How would you like them displayed?

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## My Final Farewell

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

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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.

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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?

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

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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?

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## 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.

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## My Memory Bank

## My Inner World

For many people, the spiritual self is rarely considered. In your Memory Bank, you may wish to reflect on how you feel about yourself and your place in the world, your beliefs, your values, 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?

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## My Final Farewell – My Eulogy

Who knows you and your life better than yourself? Writing your own eulogy provides your listeners with a snapshot of your life from your viewpoint. 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 that you wrote those words as a final message to them.

Write your eulogy here.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

If you do not wish to write your own eulogy, who do you choose to deliver your eulogy?



Alzheimer  
*Society*



# SUPER HEROES

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

Alzheimer Society Foundation of Brant, Haldimand Norfolk, Hamilton Halton  
645 Norfolk Street North, Simcoe, ON N3Y 3R2  
Tel: 1-800-565-4614 • [donations@alzda.ca](mailto:donations@alzda.ca) • [www.alzda.ca](http://www.alzda.ca)

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