



# *I'm Prepared (in 11 steps)*

## Legal documents - I have a valid and up-to-date :

- Enduring Power of Attorney for Property and Financial Affairs
- Enduring Power of Attorney for Personal Care
- Health Care Directive - written down, signed and updated annually?
- Guardianship Agreement - for children under 19 if both parents incapacitated
- Will - Are your executors ready and willing to act? Does the ownership of your assets and your beneficiary designations match your distribution plan? Do your beneficiaries have full capacity? Are guardians appointed for persons under 19?

## Organize and communicate your plan :

- Confirm your beneficiary designations on life insurance and registered investments and document your intention to gift any joint assets to other owner. Do they match your estate distribution plan?
- Digital assets - assign Legacy Contacts & prepare inventory memo
- Funeral arrangements- do you have your plan written down? Have you discussed it with your Executor and your family? Have you preplanned or prepaid with a funeral home?
- Record of important information - Prepare an inventory of important accounts and assets - options include: photos, paper record, binder, workbooks - see FCNB, Departing Details or use one of the online providers. Notify Incapacity Attorney and Executor of location of original documents.
- Prepare a Letter of Wishes to document your values and your instructions to your Attorney and Executor.
- Consider holding a meeting with incapacity attorney and executor to determine if they have questions about finances, property, health care instructions, etc.. Will a family meeting resolve any conflicts? Do a theoretical run through to test your planning - Does everything work the way it should?



CALL OR EMAIL ME TO MAKE AN APPOINTMENT

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www.WillsfortheUnWilling.com

*Wills for the  
UnWilling*

## Enduring Powers of Attorney and Wills :

Public Legal Education and Information Service - [Planning Ahead](#) Tel: (506) 453-5369  
[www.legal-info-legale.nb.ca](http://www.legal-info-legale.nb.ca) and E-mail: [pleisnb@web.ca](mailto:pleisnb@web.ca)

Financial and Consumer Services Commission of New Brunswick - Understanding the Power of Attorney - 1 866 933-2222, [info@fcnb.ca](mailto:info@fcnb.ca) and [www.fcnb.ca/resources](http://www.fcnb.ca/resources)

CANADA - Seniors forum - [What every older Canadian should know about powers of attorney and joint accounts](#) [www.canada.ca](http://www.canada.ca)

Canadian Foundation for Economic Education - Let's talk Money: Seniors Powers of Attorney - [www.letstalkmoneyseniors.com](http://www.letstalkmoneyseniors.com)

## Health Care Directives :

National Advance Care Planning and Health Care Directives, with an interactive workbook plan, [www.advancecareplanning.ca](http://www.advancecareplanning.ca) or [www.myspeakupplan.ca](http://www.myspeakupplan.ca) and CPR decision aid

Plan Well Guide [www.planwellguide.com](http://www.planwellguide.com) provides a decision aid on the different levels of care, with explanations about the difference between ICU, Medical and Comfort care, so participants understand the risks, benefits and outcomes of the type of treatments when planning for terminal care vs. serious illness.

Dying with Dignity Canada Toll free: 1-800-495-6156 [www.dyingwithdignity.ca](http://www.dyingwithdignity.ca)

The Conversation Project includes a starter kit, a useful tool to help people have conversations with their family members or other loved ones about their end-of-life care. [www.theconversationproject.org/starter-kits](http://www.theconversationproject.org/starter-kits)

## Organizing Your Affairs :

The Departing Details Workbook is an easy to use Organizing Estate Planner and Checklist that you can download at [www.estateworkbook.com](http://www.estateworkbook.com)

[www.memories.step.org](http://www.memories.step.org) Legacy tools to set up your digital accounts so that your loved ones can access them if you're not able to: FaceBook, Apple, Twitter, LinkedIn, Twitter, Instagram

## Preventing Elder Abuse :

Canadian Network for the Prevention of Elder Abuse - Le Réseau Canadien pour la prévention du mauvais traitement des aînés [www.cnpea.ca](http://www.cnpea.ca)

Future Us: A Roadmap to Elder Abuse Prevention - Futur Nous : Feuille de route pour la prévention des mauvais traitements contre les personnes âgées [www.futureus.cnpea.ca](http://www.futureus.cnpea.ca)

Canadian Centre for Elder Law - [The Practical Guide to Elder Abuse and Neglect Law in Canada](#) - [www.bcli.org/ccel](http://www.bcli.org/ccel)

Its Not Right - [www.itsnotright.ca](http://www.itsnotright.ca)

