

# Planning Guide

Keeping life's details  
organized & together



# Planning Guide



This guide is designed to help prioritize and organize the many tasks your loved ones are faced with following your service.

This is the time your loved ones need your guidance the most. Completing this guide will give them the information they need to finalize your funeral arrangements and move forward with your estate plan.

Please remember that while this guide will help you get started with planning your final wishes, it cannot replace the value of preplanning your arrangements with a bereavement professional (funeral home, transfer service, cemetery or crematorium) nor does it replace any legal, tax or other professional service. It is always wise to seek professional advice.

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■ Name of Funeral Home, Transfer Service, Cemetery or Crematorium where my prearrangements have been made:

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■ Phone Number:

■ Date:

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# My Information

■ Full Name:

■ Address:

■ Social Insurance Number:

■ Date of Birth:

■ Birth Place:

■ Occupation During Work Life:

■ Citizenship:

■ Marital Status:

■ Name of Spouse:

■ Spouses Surname at Birth:

■ Date of Marriage:

■ Father's Full Name:

■ Father's Birth Place:

■ Mother's Maiden Name:

■ Mother's Birth Place:

■ Will: ☐ Yes ☐ No

■ Location of the Will:

■ Lawyer Name:

Phone #:

**My Executor(s):**

■ Name:

Phone #:

■ Name:

Phone #:

■ Name:

Phone #:

# My Choices

■ Funeral Prearranged: ☐ Yes ☐ No

■ Funeral Prepaid: ☐ Yes ☐ No

■ Place of Service: ☐ Funeral Home

Other:

■ Officiant:

■ Preferred Music:

■ Person(s) to do my Eulogy:

■ Persons to be Pallbearers:

■ Burial: ☐ Yes ☐ No

If yes, do you have cemetery property? ☐ Yes ☐ No

■ Name of Cemetery:

Cemetery Section:

Cemetery Lot #:

■ Cremation: ☐ Yes ☐ No

If yes, where do you wish the ashes to be placed? ☐ Family Plot ☐ Niche

Other:

■ Name of Crematorium:

■ Entombment: ☐ Yes ☐ No

If yes, do you have a mausoleum crypt? ☐ Yes ☐ No

■ Name of mausoleum and related information:

■ Other Choices:



# My Information For Notice/Obituary

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■ For Newspaper:

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■ Social Networking Website:

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■ I Would Like My Name to be Printed This Way:

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■ My Spouse:

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■ Children and Their Spouses:

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■ Grandchildren and Their Spouses:

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■ Great Grandchildren:

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■ Siblings and Their Spouses:

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■ Parents:

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■ My Education:

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■ Professional Designations:

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■ Religious Affiliation:

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■ Clubs/Associations I Belong To:

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■ Charitable Donations To:

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■ Achievements:

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■ Additional Information:

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# Things That Really Matter

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■ Special Memories:

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■ People Who Made A Difference In My Life:

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■ The Things That I Am Most Proud Of:

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■ Favourite Pastimes:

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■ Favourite Quotes:

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■ Favourite Songs:

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■ Favourite Books:

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■ Things That Made Me Laugh:

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■ Things That Made Me Cry:

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■ My Pets:

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# My Family and Friends To Be Notified

■ Name:		
Relationship:		Phone #:
■ Name:		
Relationship:		Phone #:
■ Name:		
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Relationship:		Phone #:

# Other Contacts To Be Notified

■ <b>Accountant</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Financial Inst.</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Cable/Satellite</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Cell Phone</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Chiropractor</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Clergy</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Dentist</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Doctor</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Employer</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Eye Doctor</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Furnace/AC</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Landlord</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Telephone</b>	Company Name:	
	Contact Name:	Phone #:
■ <b>Veterinarian</b>	Company Name:	
	Contact Name:	Phone #:

# Other Contacts To Be Notified

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## OTHER ORGANIZATIONS TO CONTACT INCLUDE

HEALTH CLUBS, PHYSIOTHERAPISTS, CHARITIES, PHARMACIES

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■ Other	Company Name:	
	Contact Name:	Phone #:
■ Other	Company Name:	
	Contact Name:	Phone #:
■ Other	Company Name:	
	Contact Name:	Phone #:
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■ Other	Company Name:	
	Contact Name:	Phone #:



# My Family Tree

## 1 Name:

Born: \_\_\_\_\_

Place: \_\_\_\_\_

Married: \_\_\_\_\_

Place: \_\_\_\_\_

Died: \_\_\_\_\_

Place: \_\_\_\_\_



Spouse: \_\_\_\_\_

## 2 Name:

Born: \_\_\_\_\_

Place: \_\_\_\_\_

Married: \_\_\_\_\_

Place: \_\_\_\_\_

Died: \_\_\_\_\_

Place: \_\_\_\_\_

## 3 Name:

Born: \_\_\_\_\_

Place: \_\_\_\_\_

Married: \_\_\_\_\_

Place: \_\_\_\_\_

Died: \_\_\_\_\_

Place: \_\_\_\_\_



**4 Name:**

Born:

Place:

Married:

Place:

Died:

Place:

**8 Name:**

**9 Name:**

**5 Name:**

Born:

Place:

Married:

Place:

Died:

Place:

**10 Name:**

**11 Name:**

**6 Name:**

Born:

Place:

Married:

Place:

Died:

Place:

**12 Name:**

**13 Name:**

**7 Name:**

Born:

Place:

Married:

Place:

Died:

Place:

**14 Name:**

**15 Name:**

# My Estate Settlement Preparation

## DOCUMENTS THAT WILL MOST LIKELY BE NEEDED

### Social Insurance Numbers of:

■ Deceased: ☐ Yes ☐ No Located in:

■ Surviving Spouse: ☐ Yes ☐ No Located in:

■ Dependent Children\*: ☐ Yes ☐ No Located in:

### Birth Certificates of:

■ Deceased: ☐ Yes ☐ No Located in:

■ Surviving Spouse: ☐ Yes ☐ No Located in:

■ Dependent Children\*: ☐ Yes ☐ No Located in:

■ Marriage Certificate or Statutory Declaration of Common-Law Union

☐ Yes ☐ No Located in:

■ Prenuptial Agreement: ☐ Yes ☐ No Located in:

■ Divorce Certificate ☐ Yes ☐ No Located in:

■ Funeral Director's Proof of Death Certificate (Multiple Copies), to receive from funeral home

■ Funeral Home Statement of Account for Funeral Expenses

☐ Yes ☐ No Located in:

■ Power of Attorney ☐ Yes ☐ No Located in:

■ Living Will ☐ Yes ☐ No Located in:

■ All Pertinent Tax Slips (T5, T4-A receipts, etc.)

☐ Yes ☐ No Located in:

■ Vehicle Ownership ☐ Yes ☐ No Located in:

■ Valid Passport ☐ Yes ☐ No Located in:

■ Health Card ☐ Yes ☐ No Located in:

■ Credit Cards ☐ Yes ☐ No Located in:

■ Organ Donation Card ☐ Yes ☐ No Located in:

\*Only required if there are surviving dependent children under age 18 or between 18-25 and still in school.



# Notifications and Cancellations

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## FINANCIAL INSTITUTIONS

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### Financial Institution Account Info

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■ Name of Financial Institution:

Branch:

Phone #:

■ Name of Financial Institution:

Branch:

Phone #:

■ Name of Financial Institution:

Branch:

Phone #:

### Safe Deposit Boxes

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■ Name of Bank:

Number:

■ Name of Bank:

Number:

### Loans/Lines of Credit/Mortgages:

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■ Check One: ☐ Loan ☐ Line of Credit ☐ Mortgage

Financial Institution:

Phone #:

■ Check One: ☐ Loan ☐ Line of Credit ☐ Mortgage

Financial Institution:

Phone #:

■ Check One: ☐ Loan ☐ Line of Credit ☐ Mortgage

Financial Institution:

Phone #:

■ Check One: ☐ Loan ☐ Line of Credit ☐ Mortgage

Financial Institution:

Phone #:

### Investments:

---

■ Financial Advisor Name:

Company Name:

Phone #:

■ Financial Advisor Name:

Company Name:

Phone #:

■ Type (RRSP, RESP, RRIF, Stocks, Bonds)

Financial Institutions


# Notifications and Cancellations

## CREDIT CARD CANCELLATIONS

☐ MasterCard, located in:☐ MasterCard, located in:☐ Visa, located in:

☐ Visa, located in:

☐ AMEX, located in:

☐ AMEX, located in:

☐ Gas Cards:

Located in:

☐ Miscellaneous/Other Cards:

Located in:

## NOTES

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.



# Notifications and Cancellations

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## INSURANCE

■ Check One: ☐ Auto ☐ Life ☐ House ☐ Health ☐ Other:

Insurance Company:

Phone #:

Policy #:

Located in:

■ Check One: ☐ Auto ☐ Life ☐ House ☐ Health ☐ Other:

Insurance Company:

Phone #:

Policy #:

Located in:

■ Check One: ☐ Auto ☐ Life ☐ House ☐ Health ☐ Other:

Insurance Company:

Phone #:

Policy #:

Located in:

■ Check One: ☐ Auto ☐ Life ☐ House ☐ Health ☐ Other:

Insurance Company:

Phone #:

Policy #:

Located in:

■ Check One: ☐ Auto ☐ Life ☐ House ☐ Health ☐ Other:

Insurance Company:

Policy #:

Phone #:

---

## GOVERNMENT DEPARTMENTS

■ My income tax returns are located in:

■ My provincial health card is located in:

■ My driver's license is located in:

■ My vehicle ownership is located in:

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## PENSIONS (Check off which apply)

☐ CPP ☐ OAS ☐ Veteran's Benefit ☐ WSIB Benefits ☐ OMERS ☐ Teachers Pension

☐ Hoopp ☐ Superannuation ☐ Other:

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# Frequently Asked Questions

## THREE STEPS TO PREPLANNING YOUR FINAL ARRANGEMENTS

**Talk with your Family:** Prearranging begins with a conversation between you and your family about your final wishes. Whatever arrangements you make for yourself will have no impact on you, but will have a major impact on your family. Often times what you think will be best for your family will actually make things harder for them at the time. The plans you make will affect how they cope and come to terms with their loss.

**Get Organized:** The next step is to get organized by meeting with a Bereavement Professional in your home or at their office. They are trained to help you evaluate the options available and will help you develop a plan that makes sense for you and your family.

**Paying for the Arrangements:** The arrangements will have to be paid for eventually. The question is: pay now or have someone else pay later? Only you can decide that based on your financial status. Most people decide to prepay to make things easier for their families. There are numerous options for prepayment. Your Bereavement Professional will walk you through these options so you can determine what works best for you. If you choose to prepay, your Bereavement Professional will draw up a contract itemizing the costs and payment terms.

## FREQUENTLY ASKED QUESTIONS ABOUT PREPLANNING YOUR FINAL ARRANGEMENTS

### Why should I prepay my arrangements?

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Prepaying your final arrangements ensures that there are funds available to cover the cost of your wishes and alleviates your family from the stress of accessing funds after your death. In addition, prepaying effectively eliminates emotional overspending and frees your family to focus on the aspects of the services that matter most to them. The music, flowers, eulogy and photographs are just a few of the important things that will help your family come to terms with their loss.

### If I prepay my arrangements, is my money safe?

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Yes. All licensed bereavement establishments in Ontario contribute to a Compensation Fund which is administered by the Bereavement Authority of Ontario. This fund exists to protect the consumer.

### What if I change my mind about my pre-arrangements?

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As your life circumstances change, so can your prearrangements. In fact, it is prudent to review your prearrangements every 5-10 years to ensure your plan still makes sense for you and your family.

### Does anyone have the right to change my arrangements after I have prepaid?

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No. When you prepay your own final wishes, you have a contract between you and the bereavement establishment. As such, you are the only one who can make changes.

### What happens if I pass away while travelling?

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The most important thing to remember if a death occurs while travelling is to contact the bereavement establishment in your home town. They can advocate for you and alleviate much of the worry and confusion that can occur during this particularly stressful time. Also, you should check with the bereavement establishment to see if they offer a Travel Assistance Plan. These plans are inexpensive and cover the costs to bring you back to your home town in the event of a death away from home.

# Frequently Asked Questions

## **I received mail from an insurance company about purchasing a funeral plan. Is this the same as a prepaid funeral?**

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Not necessarily. You should never purchase any kind of “funeral plan” before talking with a representative from a licensed Bereavement Establishment. Often, these types of mailers are offering a final expense insurance policy and are not a prepaid funeral at all. A prepaid funeral will always involve an itemized prepaid contract with a licensed Bereavement Establishment, signed by a licensed Funeral Professional. If you are unsure if an establishment or representative is licensed, then you should ask to see the license.

It is important to deal only with a licensed bereavement establishment to ensure that you have a prepaid contract that qualifies under the Compensation Fund which exists to protect the consumer. Additionally, a prepaid contract up to \$15,000 with a licensed funeral establishment qualifies as an EFA (Eligible Funeral Amount) which ensures that all interest earned in the prepaid fund grows tax exempt.

## **FREQUENTLY ASKED QUESTIONS ABOUT EXECUTORSHIPS**

### **I want to name an Executor for my estate. Where do I begin?**

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It is all about choices. You can choose to have a family member, friend or third party professional handle the settlement of your estate. There are many options available: from a professional handling everything to ease the burden on your family and friends, to coexecutor services where the estate settlement is handled by both a family member/friend and a professional.

### **What are the duties of an executor?**

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An executor's duties vary depending on the complexity of the estate. Some duties include: locating, reading and interpreting the Will, gathering the estate's assets (financial, insurance, pensions) and administering the estate (close out accounts, locate missing beneficiaries, distribution of personal effects, etc...)

### **Is there assistance for my chosen Executor?**

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Executors have the right to seek assistance and still retain their decision-making authority. An executor can get help from trust companies, lawyers and accountants.

### **Do I need a Will?**

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Yes. Having a legal Will makes things easier for your family. A legal Will not only outline how your assets are to be distributed, it also states who is responsible. Not having a Will, or having a poorly drawn Will can place unnecessary stress on your family and will make simple tasks (like closing bank accounts) much more difficult.

### **What is considered a legal Will?**

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In Canada there are 4 types of legal Wills. A formal Will is drawn up by a lawyer or notary and signed according to the requirements of provincial law. A holograph Will is a handwritten Will that is signed by the maker but does not have to be witnessed (not valid in all provinces and not recommended). An international Will is drafted and signed according to set standards agreed to by certain jurisdictions who have signed an international convention regarding Wills (not valid in all provinces). The last is a Quebec notarial Will that is drawn up by a notary.

## Notes

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# Schedule an Appointment

If you have received this booklet prior to preplanning your final arrangements with a bereavement professional and would like to schedule an appointment to finalize a prearrangement, please tear out the sheet, fill out the form and send back to the bereavement professional.

Name:

Address:

City:

Province:

Postal Code:

Phone:

Email Address:

**I would like more information on the following:**

- ☐ Free estimate for my final arrangements
- ☐ Keep me posted with upcoming seminars, newsletters and topical information
- ☐ Bereavement Service options
- ☐ Travel Assistance Plans





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