



The
Diocese of Huron



ESTATE PLANNING

A Guide to Will Preparation, Powers of Attorney,
Advance Care Planning and Funeral Instructions

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This is the Will Planner of :

Full address :

Telephone :

E-mail :

Last updated :

Please note that this document is meant to be a tool to help prepare for your death as well as a tool to help those once you have passed away. It is not meant to offer legal or financial advice. It is recommended you consult with your family, lawyer and financial advisor as you prepare this information. It is also important to share the location of this important information as well as your hopes and expectations noted within.

*Christ has no body but yours,
No hands, no feet on earth but yours,*

Christ has no body but yours,
No hands, no feet on earth but yours,
Yours are the eyes with which he looks compassion on this world,
Yours are the feet with which he walks to do good,
Yours are the hands, with which he blesses all the world.
Yours are the hands, yours are the feet,
Yours are the eyes, you are his body.
Christ has no body now but yours,
No hands, no feet on earth but yours,
Yours are the eyes with which he looks compassion on this world.
Christ has no body now on earth but yours.

Christ Has No Body
Teresa of Avila (1515-1582)

As Christians, we receive God's gifts gratefully, cultivate them responsibly, share them lovingly in justice with others, and return them with increase to the Lord.

Preparing your Will is an act of Christian stewardship. Remembering your parish, the Diocese, or any of its ministries, in your estate planning is a decision of generosity and faith, and participation in the mission of the Church.

As you work at your estate plans we encourage you to talk to your family, financial advisor and lawyer. We welcome any questions as you prepare your estate. Please connect with the Diocese of Huron Stewardship team. We hope this guide helps you achieve peace of mind.

1-519-434-6893 x228

MESSAGE FROM
The Rt. Rev.
Linda Nicholls,
Bishop of Huron



Dear friends in Christ,

Every activity of worship and outreach across the Diocese of Huron happens because of the support from Anglicans like you. We have been blessed for generations with resources to serve towns, villages and cities throughout the diocesan area.

Our ancestors in faith built our church buildings and reached out in God's name with the support of clergy and lay leaders. Many of you lovingly support your local congregation every year to meet its needs and goals. You respond to God's generosity in your life with generosity to others.

Now we ask how will we support the life of the Church for the future? As God has generously blessed our lives we can share that blessing to assist the next generations. Your planned gift can make a difference to your local parish; the diocesan Episcopal Endowment Fund; Huron Development Fund; Huron Church Camp; the Robert Bennett Curacy Fund or any area of diocesan or parish life you want to strengthen!

Your bequest is an outward sign of the life of God that is within you! It tells the story of your commitment to Christ through your generosity.

We trust that this planning tool will help you tell your story of faith and commitment in response to God's love and grace.

Yours in Christ,

A handwritten signature in black ink that reads "Linda Nicholls". The signature is written in a cursive, flowing style.

The Right Reverend Linda Nicholls,
Bishop of Huron

**We would like to thank
the Anglican Diocese of Toronto Foundation
for sharing this document for our use.**



WAYS TO GIVE

The following are some of the ways you can make a planned gift.

Bequest

Through a gift in your Will you demonstrate your passions, values and hopes. You are also able to make a larger donation than may be possible during your lifetime.

By naming the Anglican Diocese of Huron or a church parish as a beneficiary in your Will, you can give a percentage of your estate, a sum of money, a gift of property or a gift of securities. Your estate will receive a tax receipt for the value of the gift, which may reduce your taxes payable to your estate.

The Benefits of Making a Bequest:

- Your bequest can be a lasting legacy for you, your family, or anyone you may wish to honour.
- You retain full control of your assets during your lifetime.
- Your bequest can provide tax relief to your estate.

Proper wording is vital to the validity of a bequest. Here are the recommended clauses for your use:

Specific Amount Bequest:

"I DIRECT my trustee(s) to pay the sum of

DOLLARS

(\$ _____)

to THE INCORPORATED SYNOD OF THE
DIOCESE OF HURON, 190 Queens

venue, London, Ontario, N6A 6H7 for its

**general purposes.*

Or

My Parish

Residual Bequest

"I DIRECT my trustee(s) to pay (*insert number that equates to percentage*) parts of the residue of my estate to the INCORPORATED SYNOD OF THE DIOCESE OF HURON, currently located at, 190 Queens Avenue, London, Ontario, N6A 6H7 for its **general purposes.*

Or

My Parish

Life Insurance

Gifts of life insurance are an affordable way to make a difference. A modest annual premium paid over time will result in a significant future legacy.

There Are Three Ways of Making a Gift of Life Insurance:

- You can donate an existing policy and receive a charitable tax receipt for the net cash surrender value (less any outstanding policy loans) and any premiums paid after the date of transfer of ownership to the Incorporated Synod of Diocese of Huron or your parish.

- You can take out a new life insurance policy, name the Incorporated Synod of the Diocese of Huron or your parish as the owner and beneficiary, and receive a charitable tax receipt for any premiums paid after the date of transfer of ownership to the Diocese.
- You can name the Incorporated Synod of the Diocese of Huron or your parish as beneficiary of your policy, or the life insurance policy from your employer, and your estate will receive a charitable tax receipt equal to the death benefit proceeds paid directly to the Diocese.

Gift of Listed Securities

When you donate publicly traded stock and securities, you will receive a tax receipt for the full appreciated value of a donation of publicly traded stock or securities and you will not be subject to any capital gains tax.

The Benefits of Making a Gift of Stock or Securities:

- Capital gains tax on publicly listed stocks and securities are exempt when you donate your shares directly to the Incorporated Synod of the Diocese of Huron or your parish or any other charitable organization rather than selling and donating the proceeds.
- The value of your tax receipt will be based on the market closing price on the day the Foundation takes legal receipt of your stock or securities into our brokerage account.
- You may claim charitable donations up to 75 percent of your net income, and a five year carry-forward on any unused donation amount is permitted.

**general purposes*—should you want to leave a gift to a specific ministry of the Anglican Diocese of Huron, please note it here. For instance, you may wish to designate your gift to The Robert Bennett Curacy Fund, Huron Church Camp, Episcopal Ministry Fund, etc.

Gift of Retirement Plan (RRSP, RRIF)

Retirement funds you no longer need can have a tremendous impact when donated to the Incorporated Synod of the Diocese of Huron. When you name the Incorporated Synod of the Diocese of Huron or your parish as a beneficiary, your estate will receive a receipt to offset taxes due from the distribution of the RRSP or RRIF, which are among the most heavily taxed assets you own.

By naming the Incorporated Synod of the Diocese of Huron or your parish as the beneficiary to your registered plan, the plan does not form part of the estate assets that require probate. This may result in significant savings in some provinces where the fee is charged on the value of the estate. A beneficiary designation can be made directly on the RRSP or RRIF application form and can be changed only by the annuitant.

Gifts of Real Estate and Tangible Property

Real Estate

A gift of real estate enables you to make a bigger charitable difference than you may have thought possible. It also helps you avoid estate taxes, and minimizes or eliminates any burden placed on your heirs.

Charitable gifts of real estate range from personal residences and vacation homes to rental properties, farmland, and commercially developed land.

You may choose to donate real estate outright and receive an immediate tax credit or retain the use of the property during your lifetime and make a planned gift in the form of a Gift of Residual Interest.

We would be happy to work with you to determine how this valuable gift can be best used to meet both your charitable goals and financial needs.

Tangible Property

Tangible property includes works of art, books, household furnishings, automobiles, equipment and collections. If you have objects in good condition containing significant value, but they are no longer of value to you, this type of gift is a possibility.

Depending on the value of the asset, such a gift to the ministries of the Diocese of Huron or your parish may require a signature to a legal document that transfers ownership.

Opinions may be needed regarding the object's origins, history and chain of title/ownership. In addition, an appraisal by a qualified appraiser will be required from you as the donor as well as one by the Diocese of Huron for our records.

Questions

If you would like more information on making a planned gift to the Diocese of Huron or to your parish please contact the Diocese office.

1-519-434-6893 x 228

1-800-919-1115 (toll free)

The Diocese of Huron is a registered charity under the Canada Revenue Agency and is listed as the **Incorporated Synod of the Diocese of Huron**. Its charitable registration number is 11896 7728 RR0001.



ESTATE PLAN CHECKLIST



Your First Steps – Reasons to prepare or update your will

- ☐ Is your current Will out of date?
- ☐ Have you moved to a new province?
- ☐ Has your net worth or employment status changed?
- ☐ Have you recently married or had children?
- ☐ Do you want to add or remove any beneficiaries?

Getting Started

- ☐ Have you chosen a lawyer?
- ☐ Have you used a tax advisor to help review your estate and the tax your estate will have to pay?

Information You Will Need to Gather

- ☐ Assets
- ☐ Bank accounts
- ☐ Life insurance policies
- ☐ Safety deposit box or storage facility location
- ☐ Securities, Investments, RRSPs and RRIFs
- ☐ Principal residence (current market value)
- ☐ Rental properties or cottage (current market value)

Other Property

- ☐ Vehicles, boats, art, antiques, expensive jewelry or collectables, etc.
- ☐ Do you own your own business? What is its value?
- ☐ Are you expecting any inheritances?

Liabilities

- ☐ List all your debts including: mortgages, credit cards, car loans, credit lines, etc.

Your Executor

- ☐ Have you chosen your Executor and asked him/her if they are willing and able to serve?
- ☐ Does your Executor know where your Will is kept?
- ☐ Will your Executor have the authority to invest your assets until the final disbursement is done?
- ☐ Do you want restrictions placed?

Guardianship of Your Children

- ☐ Have you named a Guardian of your minor children?
- ☐ Do you have an alternate Guardian in case your first choice is unable or unwilling to serve?
- ☐ Have you told your Guardian the importance of making sure your children are raised with Christian faith?

Your Beneficiary

- ☐ If you are married, have you left your RRSPs or RRIAs to your spouse or dependent child?
- ☐ Are the beneficiaries of the assets in your Will consistent with the beneficiary listing in the attached plans (e.g. RRSPs, insurance policies)?
- ☐ Are there personal items that you would like a certain family member or friend to have?
- ☐ Do you need a testamentary trust for your spouse or dependent child?
- ☐ Does a beneficiary require special care?
- ☐ Have you included your parish, favourite ministry or charity such as the Diocese of Huron in your Will?
- ☐ Have you notified the Stewardship office of your bequest intention so you can be included in our Legacy Giving Book of Life?

Questions to Ask Your Lawyer

- ☐ How can you reduce probate and your estate's income tax?
- ☐ Should you have a common disaster clause in case of an unexpected accident?
- ☐ If you have a business, do you need a succession plan?
- ☐ How can including the church and other charities in your Will reduce your estate taxes?

Other Issues

- ☐ If you want to be an organ donor, have you signed a donor card and told your family your wishes?
- ☐ Do you need a Power of Attorney for Management of Property?
- ☐ Do you need a Personal Directive?
- ☐ Have you shared your wish with your family?

Final Arrangements

- ☐ Have you pre-planned your funeral arrangements with a cemetery of your choosing?
- ☐ Have you informed your Executor and family that you want a funeral through your Anglican church?
- ☐ Name of church :
- ☐ Have you considered your parish and/or favourite charity as your in-lieu-of-flowers designation?

Name of Lawyer or Law Office that Prepared My Will:

Address :

Telephone number :

E-Mail address :



PERSONAL INFORMATION

Date This Information Was Prepared:

Do You Have a Will?

☐ Yes ☒ No

Date: _____

Location: _____

Does Your Spouse?

☐ Yes ☒ No

Date: _____

Location: _____

Date of Any Earlier Will:

Where is the earlier Will or copies of this Will?

Who has access to it?

Surname:

Given names :

Other names used (maiden name, etc.) :

Current Address:

STREET, UNIT

CITY

PROVINCE

POSTAL CODE

Do You Live Outside of Canada for Part of the Year?

☐ Yes ☒ No

If yes, please elaborate :

Date of birth :

Place of birth :

Citizenship :

Social Insurance Number :

Occupation :

Employer :

Business address :

Business telephone :

Residence telephone :

Cellular telephone :

Marital Status:

☐ Single ☒ Married ☒ Widowed
☐ Separated ☒ Divorced ☒ Common Law

Is there a marriage contract or pre-nuptial agreement?

Complete if Any Previous Marriages

Previous marriage :

Name:

Date:

Divorce granted :

Date:

Paper located:

Are there continuing financial obligations under this agreement (spouse, child or other)?

Provide your lawyer with a copy of the agreement and/or the decree.

Previous marriage :

Name:

Date:

Divorce granted :

Date:

Paper located:

Are there continuing financial obligations under this agreement (spouse, child or other)?

Provide your lawyer with a copy of the agreement and/or the decree.

If widowed :

Spouse full name:

Date of death:

Spousal Information

(complete if you are currently married)

Spouse's name :

Social Insurance Number :

Spouse's alternative names (e.g. maiden name) :

Citizenship :

Spouse's address (if different from yours) :

Date of marriage :

Place of marriage :

Spouse's date of birth :

Location of Documents

Birth Certificate :

RRIF documents :

Passport :

Tax-Free Saving Account (TFSA) documents :

Citizenship papers :

Investment accounts :

Power of Attorney for Property :

Income Tax Returns :

Power of Attorney for Personal Care :

Other :

Insurance Policy contracts :

Other :

Pension Plan documents :

Other :

Annuity/Annuities documents :

Other :

RRSP documents :

Other :

Association Memberships

Association Membership 1

Organization :

Dues owed date :

Is payment automated?

☐ Yes ☒ No

Association Membership 2

Organization :

Dues owed date :

Is payment automated?

☐ Yes ☒ No

Association Membership 3

Organization :

Dues owed date :

Is payment automated?

☐ Yes ☒ No

Important Passwords

(Do not include financial passwords such as bank, credit cards, PayPal, utilities, etc. unless this document will be securely locked)

E-mail address and password :

E-mail address and password :

Facebook account and password :

Instagram username and password :

Blog username and password :

Twitter account name and password :

Linked-In account name and password :

Cell Phone login and voicemail password :

Laptop username and password :

Other usernames and passwords:



INFORMATION ABOUT CHILDREN /DEPENDENTS

Child/Dependent 1

FULL NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

RELATIONSHIP TO YOU

DATE OF BIRTH

MARITAL STATUS (NAME OF SPOUSE)

NUMBER OF CHILDREN AND NAMES

TELEPHONE NUMBER

Child/Dependent 2

FULL NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

RELATIONSHIP TO YOU

DATE OF BIRTH

MARITAL STATUS (NAME OF SPOUSE)

NUMBER OF CHILDREN AND NAMES

TELEPHONE NUMBER

Child/Dependent 3

FULL NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

RELATIONSHIP TO YOU

DATE OF BIRTH

MARITAL STATUS (NAME OF SPOUSE)

NUMBER OF CHILDREN AND NAMES

TELEPHONE NUMBER

Child/Dependent 4

FULL NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

RELATIONSHIP TO YOU

DATE OF BIRTH

MARITAL STATUS (NAME OF SPOUSE)

NUMBER OF CHILDREN AND NAMES

TELEPHONE NUMBER

If you have other personal information you wish to discuss in more detail (e.g., disabled child, special bequests for child or children, directive for pet or pets), provide additional information below.

Please provide brief details concerning any other person(s) to whom you provide assistance :

Child Guardians

If you have underage children (under 18 years old), it is crucial to name a child guardian and an alternate guardian in your Will. Choose someone you trust your child's care with. Ensure you have a discussion with the potential guardians before you name them in your Will. It may be wise to provide extra money in your Will to help guardians take care of your children.

Child Guardian

GUARDIAN NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

RELATIONSHIP TO YOU

Child Guardian Alternate

ALTERNATE GUARDIAN NAME

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

RELATIONSHIP TO YOU

Family History

Father

Name: _____

Place of birth: _____

Date of birth: _____

Mother

Maiden name: _____

Place of birth: _____

Date of birth: _____

Immediate Relatives

Name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Sibling

Name: _____

Address: _____

Date of birth: _____

Sibling

Name: _____

Address: _____

Date of birth: _____

Sibling

Name: _____

Address: _____

Date of birth: _____

Sibling

Name: _____

Address: _____

Date of birth: _____

Additional Notes:



EXECUTORS

(Personal Representatives)

When you choose an Executor (also called a Trustee) it is wise to choose more than one because an Executor could predecease you or be unable to serve. An executor is a legal term referring to a person named by the maker of a Will, to carry out the directions of the Will. Typically, the executor is the person responsible for offering the Will for probate, although it is not required that he/she fulfill this. The executor's duties also include disbursing property to the beneficiaries as designated in

the Will, obtaining information of potential heirs, collecting and arranging for payment of debts of the estate and approving or disapproving creditors' claims. An executor will make sure estate taxes are calculated, necessary forms are filed, and

tax payments are made. They will also assist the attorney with the estate. Additionally, the executor acts as a legal conveyor who designates where the donations will be sent using the information left in bequests, whether they be sent to charity or other organizations. Trust companies or banks can also act as Executor and will always be able to serve.



Executor

Name :

Relationship :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

Co-Executor

Name :

Relationship :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

Alternate Co-Executor

Name :

Relationship :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

General and Enduring Power of Attorney

A power of attorney is a legal document that you can sign to give one person, or more than one person, the authority to manage your money and property on your behalf. The person or persons you appoint is/are called "attorney". The person or persons need not be a lawyer.

A general power of attorney is a legal document that can give your attorney (the person you appoint in your power of attorney document) authority over all or some of your finances and property while you are mentally capable of managing your own affairs. It ends if you become mentally incapable of managing your own affairs.

An enduring or continuing power of attorney is a legal document that lets your attorney continue acting for you if you become mentally incapable of managing your finances and property. It can also give your attorney authority over all or some of your finances and property. An enduring or continuing power of attorney can take effect as soon as you sign it. In some cases, it is possible to have the power of attorney come into effect only when you become mentally incapable, if this was specified in the document. For more information please review the Government of Canada's webpage, "What every older Canadian should know about: Powers of attorney (for financial matters and property) and joint bank accounts" here, <http://www.seniors.gc.ca/eng/working/fptf/attorney.shtml>

General Power of Attorney

I have a general power of attorney document

☐ Yes ☒ No

Date power was granted :

Name of attorney granted power :

Relationships :

Name of attorney granted power :

Relationships :

Name of lawyer who witnessed the granting of
the power of attorney :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

Enduring or Continuing Power of Attorney

I have an enduring or continuing power of
attorney document

☐ Yes ☒ No

Date power was granted :

Name of attorney granted power :

Relationships :

Name of attorney granted power :

Relationships :

Name of lawyer who witnessed the granting of
the power of attorney :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

HOME TELEPHONE

WORK TELEPHONE

CELL PHONE

EMAIL

Other Important Contacts

Accountant

Name :

Company :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

Banker

Name :

Company :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

Investment Advisor

Name :

Company :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE

Insurance Advisor

Name :

Company :

Address

STREET, UNIT

CITY/ TOWN

PROVINCE

POSTAL CODE



PERSONAL DIRECTIVES

Personal directives are legal documents which allow you to name a decision maker and/or provide written instructions to be followed when, due to illness or injury, you no longer have the capacity to make decisions such as where you will live or the medical treatment you will receive.

Have you written an Advance Care Directive?

☐ Yes ☒ No

Location :

Family, Friend(s), Attorney who have a copy :

Spiritual Care When You are Ill

When you are admitted to the hospital, identify yourself as an Anglican. Ask family or friends to notify the hospital Chaplain and/or your parish priest that you are there so you can receive spiritual care and visits.

Organ and Tissue Donation

Do you have a directive about donating your body?
(please write it out here or write N/A)

If you have not already, please consider organ and tissue donation. Such a noble donation saves lives and improves the quality of life for many more. Please also notify your family, friends and executors of your decision.

If you are interested in learning more about organ donation please contact:

Website:

www.gifttolife.on.ca

Address:

Trillium Gift of Life Network
522 University Avenue, Suite 900
Toronto, ON M5G 1W7

Phone (General Inquiry):

1-800-263-2833 (Toll Free)
416-363-4001 (in Toronto)

Email:

info@gifttolife.on.ca

Or to easily register to be an organ or tissue donor on-line go to www.beadonor.ca



INFORMATION ABOUT YOUR ASSETS AND LIABILITIES

(Please mark as N/A any request for information not relevant to your asset position and use last page for additional information, if necessary.)

Primary Residence

Full address :

Year purchased :

Cost when purchased :

Current market value (est.) :

Manner of ownership (if jointly, who is joint owner?) :

Outstanding Mortgage (approx):

First:

Second:

Interest:

Is this your principal residence or that of your spouse?

☐ Yes ☒ No

Recreational Property

Full address :

Year purchased :

Cost when purchased :

Current market value (est.) :

Manner of ownership (if jointly, who is joint owner?) :

Outstanding Mortgage (approx):

First:

Second:

Interest:

Is this your principal residence or that of your spouse?

☐ Yes ☒ No

Rental Property Owned By You

Full address :

Year purchased :

Cost when purchased :

Current market value (est.) :

Manner of ownership (if jointly, who is joint owner?) :

Outstanding Mortgage (approx):

First:

Second:

Interest:

Maturity date:

Farm or Business Property

Full address :

Year purchased :

Cost when purchased :

Current market value (est.) :

Manner of ownership (if jointly, who is joint owner?):

Outstanding Mortgage (approx):

First:

Second:

Interest:

Maturity date:

Pension and Other Plans

Do you belong to or contribute to a company pension plan?

☐ Yes ☒ No

Who is the beneficiary?

Describe benefits :

Have you contributed to the Canada or Quebec pension fund?

☐ Yes ☒ No

How many years?

Do you have a registered retirement savings plan (RRSP)?

☐ Yes ☒ No

Company:

Current value :

Beneficiary :

Does your spouse have any of the above plans?

Insurance on Your Life or Owned By You

Name of insurance company :

Face value of policy :

Policy number:

Type of policy:

Who pays the premiums?

Name of beneficiary :

Owner :

Group Life Insurance

Name of insurance company :

Address of insurance company :

Face value of policy :

Policy number:

Type of policy:

Who pays the premiums?

Name of beneficiary :

Investments

Stocks:

Approximate total value:

Approximate total cost:

Are any companies located outside Canada?

Mortgages:

Approximate total value :

Are any on real property located outside Canada?

Bonds or Other Interest-Bearing

Securities:

Approximate total value :

Are any companies located outside Canada?

I have an Income Fund or Annuity?

☐ Yes

☒ No

Add additional information including company name, owner and beneficiary, joint survivor, etc.

Business or Professional Financial Information

Business name :

Full address :

Type of business :

☐ Partnership ☒ Limited company

Fiscal year end :

Has a buy-sell or other agreement been entered into?

If incorporated, year of incorporation :

Personal and Household Items of Significant Value or Importance

(add additional pages if required)

ITEM	APPROXIMATE TOTAL VALUE	INSURED VALUE	I WISH TO BEQUEATH IT TO (NAME OF PERSON OR ORGANIZATION AND ADDRESS)

Listed Personal Property

(paintings, jewellery, stamps, sculptures, etc.)

ITEM AND DESCRIPTION	APPROXIMATE TOTAL VALUE	INSURED VALUE	I WISH TO BEQUEATH IT TO (NAME OF PERSON OR ORGANIZATION AND ADDRESS)

Bank Accounts

NAME OF BANK	LOCATION	TYPE OF ACCOUNT *	ACCOUNT NUMBER

*Joint Chequing; Individual Chequing; Joint Savings; Individual Savings; TFSA; etc.

Cars, Trucks and Recreational Vehicles

YEAR OF AUTOMOBILE	MAKE OF AUTOMOBILE	VALUE	OWNERSHIP	VEHICLE IDENTIFICATION NUMBER (VIN)

Safety Deposit Boxes

LOCATION	BOX NUMBER	REGISTERED NAME	LOCATION OF KEY

Interests

(estates, trusts, expected inheritances, etc.)

Foreign Income

(dividends or rental payment)

Other Assets

(identify which, if any, are situated outside of your primary province of residence)

Liabilities

(list bank loans, personal loans, etc. and other significant debts or contingent liabilities but not credit cards)

AMOUNT OF DEBT	OWED TO	FULL ADDRESS

Credit Cards in your Name or Shared Jointly

Name :

Jointly owned with :

Name :

Jointly owned with :

Name :

Jointly owned with :

Name :

Jointly owned with :



PRELIMINARY CONSIDERATION CONCERNING THE DISTRIBUTION OF YOUR ESTATE

Specific bequests of personal items in my Will not already mentioned.
Below is a description of the item and the beneficiary :

ITEM AND DESCRIPTION	BENEFICIARY NAME AND ADDRESS

Name the specific cash or percentage for any legacies you wish to leave to individuals such as children, grandchildren, other family members, and friends :

INDIVIDUAL NAME AND ADDRESS	AMOUNT (% OR \$)

Name the specific cash or percentage for the legacies you wish to give to charities or not-for-profits such as the Diocese of Huron:

ORGANIZATION NAME AND ADDRESS	AMOUNT (% OR \$)

Provisions for spouse (outright distribution or trust estate):

Do any beneficiaries require special financial or protective care?

Provisions for children (immediate payment or hold-up of capital to specific age):

At your death, is your business interest to be continued or sold?

Alternate provision if spouse and/or children predecease you:

If business is to be continued, who do you contemplate could manage it?



PREPARING FOR YOUR DEATH, BURIAL AND THE CELEBRATION OF YOUR LIFE



At the Time of Death

Planning for your end of life—dealing with casket selection, plot purchases, pallbearers, hymns and the like—can relieve your family of making these

decisions under the stress of grief. While you may not want your family and friends to “make a fuss” please remember, the bereaved may need a place to grieve.

The following are preparations you may want to consider, or choose to leave open.

At or near the time of my death please contact the following :

Name: _____

Relationship: _____

Phone: _____

Name: _____

Relationship: _____

Phone: _____

Do you have a preference for funeral homes?

☐ Yes ☒ No

If yes, what funeral home?

Name: _____

Telephone: _____

Address: _____

Do you wish to be cremated?

☐ Yes ☒ No

Has this been pre-paid?

☐ Yes ☒ No

Where do you wish your remains to be buried?

Has this been pre-paid?

☐ Yes ☒ No

Have you chosen a monument or marker?

☐ Yes ☒ No

Has this been pre-paid?

☐ Yes ☒ No

I would like my marker to read :

In lieu of flowers or other memorial contributions where do you want them to be sent (name specific institutions such as Diocese of Huron, your parish, etc.)?

Burial Service

Your church / Parish is :

Full address :

Primary contact (title and name):

I prefer the burial service in the:

☐ Book of Common Prayer

☐ Book of Alternative Services

☐ Other:

Would you like the Eucharist to be celebrated at your funeral?

☐ Yes ☒ No

Clergy

Clergy you wish to be a part of your funeral service if possible:

Name:

Role*:

Name:

Role*:

Name:

Role*:

*e.g. preacher, presider

Musicians

Church musicians generally have the first right of refusal at any service that takes place in their parish. Are there other musicians you may like to participate in/help to organize funeral music?

Name:

Role:

Preferred hymns or anthems to be a part of the service:

Family and Friends

Family members or friends to take part in your funeral service if possible:

Name:

Relationship:

Role**:

Name:

Relationship:

Role**:

Name:

Relationship:

Role**:

Name:

Relationship:

Role**:

**e.g. reader, speaker

Readings

Within the Anglican Church tradition, the burial service suggests Scripture readings appropriate for Christian burial. Other churches or denominations might not. Are there scripture

readings you would like to be shared as part of the service?

Your favourite Old Testament passage is :

Your favourite Psalm passage is :

Your favourite New Testament passage is :

Your favourite Gospel passage is :

Requests

The kind of gathering you would like before or after the service is :

Wishes for your celebration of life and burial you would like your family, friends and/or clergy to know :

Please include the following when writing my obituary :

Signature :

Date :



WHAT HAPPENS FOLLOWING A DEATH

The loss of a loved one is difficult. Here is a list that can help you identify what to do when someone passes away.

(The following information was obtained from Service Ontario, web address: <https://www.ontario.ca/page/how-get-copy-ontario-death-certificate-online>)

First Steps

The funeral director will register the death by completing the Statement of Death. This will be done with information received from a family member and the medical certificate.

What You Need to Know

Death Registration

In the event of a death, the attending physician or coroner completes the Medical Certificate of Death and gives it to the funeral director with the body of the deceased.

To register a death, a family member and the funeral director must complete the Statement of Death with information about the deceased.

Once completed, the Medical Certificate of Death and the Statement of Death are submitted to the local municipal clerk's office by the funeral director.

Death Certificate

The funeral director will issue copies of proof of death that you can use in certain situations. There are some organizations, however, that may require an official death certificate from the Province of Ontario.

You may need an official death certificate or certified copy for:

- settling an estate
- insurance purposes
- access to/termination of government services, e.g. health card, pension, voters' list
- genealogy searches

The Long Form death certificate does not include medical cause of death. This is obtained by applying for an extended long form death certificate by fax, mail or at the following Service Ontario Centre:

47 Sheppard Avenue East, unit 417, 4th Floor
Toronto, ON M2N 5N1

You may need the extended long form death certificate for:

- settling an estate outside the country
- pension purposes outside the country

If you are unsure if you need a file sized certificate or certified certificate, please check with the Ministry, government agency, or person requesting the document before you order.

Obtain a Death Certificate

You can order a copy, or multiple copies online, if the death is registered in Ontario. You can use this certificate to cancel a health card or driver's license and for insurance purposes. To order a death certificate, you will need:

- ☐ first and last name of the person who died
- ☐ sex of the person who died
- ☐ date of death
- ☐ name of city or town in which death took place
- ☐ parental information about the person who died
- ☐ spouse or partner information of person who died, if applicable

If you have any questions, please contact:

Office of the Registrar General
189 Red River Road, 3rd floor
PO Box 4600
Thunder Bay, ON P7B6L8

Telephone:

1-800-461-2156 (outside of Toronto)
1-416-325-8305 (in Toronto)
1-416-325-3408 (TTY/Teletypewriter)

Fax:

1-807-343-7459

Who to Advise

Pensions and Benefits – Federal

- ☐ Old Age Security (OAS) and Canada Pension Plan (CPP)
- ☐ Employment Insurance (EI) benefits
- ☐ Canada Revenue Agency (CRA)
- ☐ International Benefits Federal
- ☐ Canada Child Tax Benefits (CCTB) / Universal Child Care Benefit (UCCB)
- ☐ Canada Pension Plan / Old Age Security Program

- ☐ Canada Savings Bonds
- ☐ Goods and Services Tax (GST) Credit
- ☐ National Defence Disability and Death Benefits
- ☐ Veterans Affairs Disability Program Benefits
- ☐ Veterans Affairs Funeral, Burial and Gravemarking Assistance

Pensions and Benefits – Provincial

- ☐ Life Insurance Policies
- ☐ Motor Vehicle Accident Insurance Policies
- ☐ Guaranteed Income Supplement
- ☐ Guaranteed Annual Income System (GAINS)
- ☐ Ontario Disability Support Program
- ☐ Ontario Drug Benefits
- ☐ Ontario Savings Bonds
- ☐ Ontario Works
- ☐ Trillium Drug Program
- ☐ Workplace Safety and Insurance Board Benefits

Other

- ☐ Former employers of the deceased for company pensions
- ☐ Any regular services received, i.e. lawn care, snow removal, house cleaning, etc.
- ☐ Canada Post
- ☐ Utilities

Personal Identification

- ☐ Social Insurance Number (SIN)
- ☐ Passport
- ☐ Citizenship Permanent Resident Card
- ☐ Secure Certificate of Indian Status (SCIS)
- ☐ Driver's License
- ☐ Health Card

To Find Out More Please Visit:

www.ontario.ca/page/what-do-when-someone-dies

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 or other markings on the paper.

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*Remember that when you leave this earth,
you can take with you nothing that you
have received – only what you have given:
a full heart enriched by honest service, love,
sacrifice and courage.*

St. Francis of Assisi

LET'S CONNECT

The Stewardship Department of the Diocese of Huron would be delighted to work with you and your advisors to arrange a gift that best suits your objectives. You can reach us at:

190 Queens Avenue
London, ON N6A 6H7

Phone 416-434-6893 ext. 228 or 1-800-919-1115
Fax 519-613-8932
www.diohuron.org



The
Diocese of Huron