# Personal planning

## for people affected by dementia

Alzheimer Society
BC & YUKON

This resource offers information on important planning issues to consider. It is an informational resource only and does not provide legal advice. Please consult your lawyer, notary, doctor, health-care team and/or financial advisor to ensure your financial, legal, health and personal care planning is appropriate for your needs.

### Health care and personal affairs

- ☐ Have conversations with your family and friends on how to provide support when current arrangements are no longer safe (e.g. living arrangements, driving a vehicle).
- ☐ Discuss plans to retire from driving now or in the future with your doctor and/or your family. Explore alternative methods of transportation.
- ☐ Register a **Representation Agreement** *(Section 9 or Section 7, depending on your circumstances)* to name someone to make care decisions for you.
- ☐ Consult with your doctor about a Medical Order for Scope of Treatment (MOST) form to inform health-care providers about your goals for care.

**Consider this:**

Plan early with an Enduring Power of Attorney and a Representation Agreement helps prevent decision making problems or disputes.

- ☐ Connect with Alzheimer Society of BC and Yukon to learn more and connect with others.
- ☐ Explore options for home support, respite care, day programs or residential care by contacting your regional health authority's Home and Community Care office.
- ☐ Communicate end-of-life care choices to your representative (appointed through a *Representation Agreement)* and family.

### Financial and legal affairs

- ☐ Consult with a lawyer or notary and a financial planner.
- ☐ Make and register an **Enduring Power of Attorney** and **Will**.
- ☐ Inform your family of wishes/plans to avoid potential disputes. For example, make a list of personal items and who you would like to receive them.
- ☐ Review beneficiaries for life insurance, RRSPs, RRIFs, pensions, etc. Consider a charitable gift as part of estate planning.
- ☐ Complete the T1013 Authorizing or Cancelling a Representative form to give permission for someone else to access your tax information.
- ☐ Apply for applicable tax credits.
- ☐ Review insurance needs (e.g. house, life, car or long-term care insurance).
- ☐ Ensure that someone you trust can access your bank account and safety deposit box.

**Consider this:**

Remember, putting these documents into place takes time. Pick one item at a time to focus on and reach out to a professional (e.g. lawyer, notary, health authority, etc.) for help when it is needed.

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## Tips and resources

### Prepare a file with your important documents and key information, such as:

- Your birth date and identification numbers (SIN, MSP, driver's licence).
- Names of financial and legal advisors, executor(s) and individual(s) appointed through an *Enduring Power of Attorney* and *Representation Agreement* to act on your behalf.
- Phone numbers of family, your health-care professionals (e.g. doctor, dentist) and other important people (e.g. home support worker, regional health authority contacts).
- Location of important planning documents, such as your *Enduring Power of Attorney, Representation Agreement, Will, Advance Directive* and *MOST*.
- List of assets, deed(s), insurance policies.
- Bank account and investment account numbers, location of safety deposit box, security codes for home safe and credit card information.
- List of passwords (email, computer, voicemail, etc.).
- Location of where a duplicate set of keys are located. Ensure the keys are labeled.

**Consider this:**

Register your legal documents with the Nidus Personal Planning Resource Centre and Registry.

**Note:** If plans are not made or are inadequate, a ***temporary substitute decision maker*** may be assigned by a health care provider to make health care decisions. In some cases, the Public Guardian and Trustee of BC may be given authority to make health-care, personal care, legal and financial decisions through ***committeeship***.

### Health and personal care resources:

**Alzheimer Society of BC and Yukon**

www.alzheimerbcyukon.org, 1-800-936-6033

**B.C. Ministry of Health:**
www2.gov.bc.ca/gov/content/health

**Your local health authority:** Connect with your local health authority by visiting:

- Vancouver Coastal: alzbc.org/vancouver-coastal-resources
- Island health: alzbc.org/island-resources
- Fraser health: alzbc.org/fraser-resources
- Interior health: alzbc.org/interior-resources
- Northern health: alzbc.org/northern-resources

**Seniors First BC:** www.seniorsfirstbc.ca

**Advance Care Planning Canada:**
www.advancecareplanning.ca

**Advance Care Planning** (BC Ministry of Health):
www2.gov.bc.ca/gov/content/family-social-supports/seniors/health-safety/advance-care-planning

### Financial and legal resources:

**Nidus Personal Planning Resource Centre and Registry:** www.nidus.ca

**People's Law School:** www.publiclegaled.bc.ca

**Public Guardian and Trustee of BC:**
www.trustee.bc.ca, 1-800-663-7867

**Legal Referral Service:** www.accessprobono.ca/our-programs/legal-referral-service, 604-687-3221

**Canada Revenue Agency:** www.canada.ca/en/revenue-agency.html

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