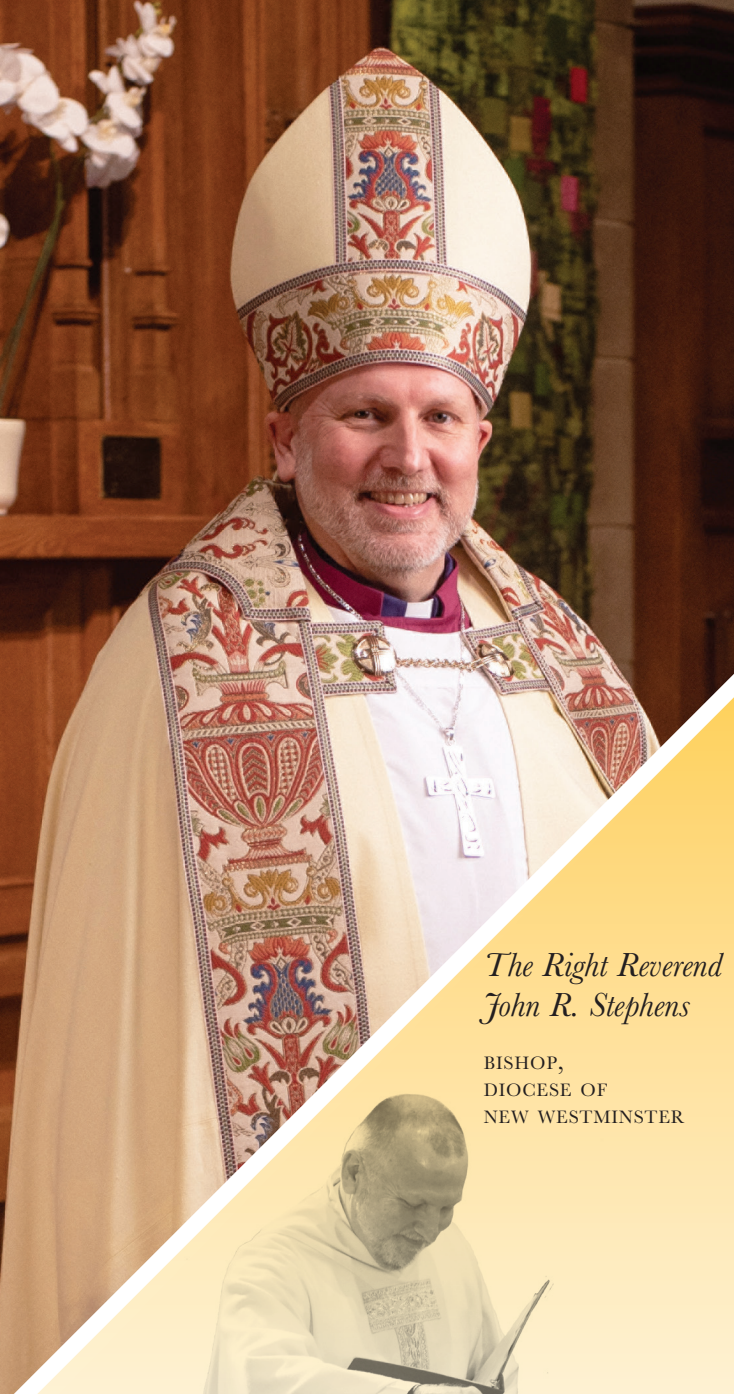


LEGACY PLANNER

Helping Anglicans make choices about ultimate stewardship and end of life decisions



Diocese of New Westminster
ANGLICAN CHURCH OF CANADA



*The Right Reverend
John R. Stephens*

BISHOP,
DIOCESE OF
NEW WESTMINSTER



GREETINGS

FROM BISHOP JOHN STEPHENS

Dear Friends,

Each of us, who has had to resolve the estate of a loved one knows how important it is for the deceased person to have spent time in reflection about what mattered to them. When this has not happened it is difficult, especially when we are grieving, to know the wishes of the departed.

Legacy Planner provides a way for anyone to take responsibility for the details about the end of one's own life when it is possible to do so. Within this, decisions need to be made about the distribution of all assets and possessions based on those people and organizations (including the Church) that you love, about who will make health and financial decisions should you become incapacitated, and about any funeral arrangements.

My prayers are with you as you do this work—work that is an expression of the love you have for your family and friends, now and forever.

Blessings & Peace

+ J

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This planner will help you
put your personal affairs in order,
including a possible legacy
or ultimate stewardship gift,
in thanks to God for the gifts and
blessings given to you during your
lifetime.

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INTRODUCTION

“Watch therefore for you do not know on what day the Lord will come.”

MATTHEW 24:42

Jesus’ words may seem a warning to some, but for those who are prepared, they are words of assurance that He will come and will reward our faithfulness.

Preparation, true spiritual preparation, encompasses every aspect of our lives: our spiritual lives, our business lives, our community lives, our family lives, and our personal lives. Each of us is expected to keep his or her house in order and to plan for the future. Those are the subjects of this booklet. We hope it will be useful.

At the time of a person’s sudden illness or death or even a devastating diagnosis, family members or friends are often faced with the need for specific information. It is extremely helpful for them to have

access to a record of insurance papers, marriage and birth certificates, bank account numbers, investments, etc.



separate documents, although many of the materials will be the same.

This booklet can help you make a plan and decide about what is to happen to your assets and your body at the time of incapacity or death. It also provides a place to make and keep a record of the information others would need.

For married couples, each spouse should compile separate information and prepare

Review the information periodically, preferably with the person(s) who must use the information.

We suggest that you make one or more copies of the information sheets after completing them. Keep one copy with important papers and put others in sealed envelopes and give them to trusted persons. Some people keep one copy in a plastic bag in the refrigerator for easy access. These instructions are not legally binding, but show the intent of the person signing the form as of the date signed.

Copies of the *Legacy Planner* can also be found at the website for the Diocese of New Westminster: www.vancouver.anglican.ca

Christian Preamble

FAITHFUL WITNESS AND ESTATE PLANNING

A *Christian Preamble* to one’s *Will* allows one to share his/her faith with family and friends. Through this personal statement of faith, you can deliver an important message to those you love the most. This message of faith will be delivered at

a time of grief and loss and will serve to invite friends and family to place their trust in Jesus Christ, just as the person who sent the message did.

The preparation of a *Will* or estate plan should begin with prayerful consideration. The *Christian Preamble* may read:

*I, _____, of the City of _____,
and Province of _____, being of sound mind
and memory and being under no restraint, do make, declare and
publish this my last Will and Testament, hereby revoking all
Wills and Codicils heretofore made by me.*

*In thanksgiving to God for the gifts of life, and for the many
blessings which God has showered upon me; and in thanksgiving*

to God for the gifts of faith and hope through Jesus Christ; and in thanksgiving to God for the gifts of nurture and love through the Church where I have shared faith and fellowship; I now commend my loved ones to grow in this same faith, being true to their Baptism, knowing that God will continue to provide for them in their lifetime; I encourage them to place their faith and trust in our Lord and Saviour.

I therefore... (then the particulars of the Will would follow, leaving gifts as desired to family and friends, but also articulating the gifts left to various Church ministries and charitable causes.)

Some people also use language such as the following as they make gifts to support various ministries:

I faithfully respond with a decision to (insert appropriate wording for your gift intention) This gift is an expression of my thanksgiving and stewardship, with the hope that it will help strengthen and extend the ministries of Jesus Christ in the life of the Church.

Others may wish to communicate much the same message in their own words. And some insert something about their own history with their church or other organisation(s) they support through a bequest in their *Wills*. Working with your lawyer, please use whatever seems appropriate to you.

LOVING LETTER

While a *Will* lets you direct the distribution of your material assets, often it is also the last communication from you to those you love. In order for you to leave a warmer last communication, we suggest that you also prepare one or more “loving letters” (or audiotapes, videotapes, computer disks, etc.) to say the loving things you would like your family and friends to know. These should be kept with the *Will* in a sealed envelope and reviewed and updated whenever the *Will* is reviewed and updated.



Your Plan on Death or Incapacity

WHY A WILL?

Making a *Will* is your opportunity to express, in legal terms, your priorities and concerns for the people and institutions in your life. The rubric from the *Book of Common Prayer* (page 714) reminds Anglicans “...to liberally give alms to the poor.” This offers you a threefold opportunity: (1) to support your church; (2) to continue to give life to the areas of the church community you care about; and (3) to make a witness to your family and friends of what was important and valuable in your life.

Making a *Will* is an essential step to help reduce the confusion and uncertainty that death brings. It provides reassurance to your family.

A Will

- Allows the person you name as your executor to act immediately—to make funeral arrangements and take charge of your estate;
- Protects your worldly possessions and ensures they are dealt with as you have directed;
- Affords the opportunity to make suitable arrangements for minor children, other dependents and pets;



- Clarifies for family and friends what your wishes are and who is to carry them out;
- Minimizes probate costs for your estate and the effort involved in managing it.
- Before you contact a lawyer to draw your Will gather this information:
- Make a list of every person for whom you have responsibility;
- List every person that you would like to remember in your will;
- Make a list of all your material assets;
- Make a list of all your debts and financial obligations;
- Calculate your net worth;
- Ask your chosen executor and/or executrix if he and/or she is willing to serve;
- Speak to the people you have chosen as guardians for your minor children. Make sure they agree to do this;
- Talk with your Rector or priest about ministries of the church that could best benefit from a bequest in your *Will*;
- See the “Giving It All Away” exercise on page 9 to determine how you want to distribute your estate.

Creating a *Will* does not need to be complicated or expensive. Even when the *Will* is more complicated, its cost is minimal for the peace of mind it buys or to avoid the litigation and problems after death that sometimes happen—and often for the taxes it saves.

Lawyers and notaries public prepare *Wills*, though there are some restrictions on the types of *Wills* that notaries can make. Self-help *Will* kits are available in stores, but mistakes are easy to make and you are taking a risk that a *Will* prepared without professional

advice will not do what you want. *Will* making is an area where professional advice is well worth the cost.

In BC, a *Will* must be witnessed by two people who must both be present at the same time you sign your *Will*. A gift made in a *Will* to someone who acts as witness (or to their spouse) may be invalid. A handwritten *Will*, not witnessed, is not normally valid in BC.



When a BC resident dies without a *Will*, the law of the Province of British Columbia decides what is to be done with the assets. What difference does it make? Doesn't the law give your assets to your next of kin? Yes, but not as you would have distributed them; but not to your special friend, not to your church or your school or other favorite charities. In the absence of a *Will* that expresses your wishes clearly and legally, the law operates according to a formula. It will not consider the special needs of any of your family members and someone in your family may have to apply to court to be in charge or the Public Guardian and Trustee will be in charge.

You can only be certain that your wishes will be carried out as you intend if you make a *Will* and update it every few years or every time your situation changes significantly, such as when marrying or divorcing, moving to another province, when your children mature, a family member is born or dies, your executor moves away or becomes incompetent, you retire, etc.

Choosing your executor is important. Most people choose their spouse, an adult child or trusted friend.

Some people choose a professional such as a lawyer or trust company. In certain cases, the Public Guardian and Trustee may agree to be your executor. Whatever you do, always make sure the person you wish to appoint as executor is willing to act.

► CARE OF DOCUMENTS

Once you have made a *Will*, tell your executor where you keep your *Will* and other important documents. S/he will need to access this information immediately on your death. Use this booklet to develop your funeral plan and discuss your wishes with your executor and family. If your lawyer or notary has not already done this, you should register your *Will* with the Ministry of Health Vital Statistics Agency to ensure that the location of the original is on record.

► SUGGESTED BEQUEST WORDING

The Diocese of New Westminster's Planned Giving Office is able to provide suggested bequest wordings for your lawyer or notary public to use in drawing up your *Will*. Your lawyer or notary public should advise you which may be right for you.

Subject to church policies, you may specify that the principal of your bequest be held as an endowment from which only the income is spent, or you can establish a fund in your name, or the name of a family member, friend or colleague, as a thanksgiving offering or as a memorial.

General directives or wishes, not strict requirements are a good idea where a bequest is intended. It gives the Church the power to use your gift for a different purpose in the event that the original purpose is no longer possible and/or necessary.

1. In British Columbia, if you are an adult (19 years or older), no one has an automatic right to manage your affairs if you have an illness, accident or disability. If you do not make a legal plan other laws or policies or the court, not you, will decide who can help you.
2. You need to be concerned about two areas:
 - (1) Financial and Legal Matters, and
 - (2) Health and Personal Care.
3. The Enduring Power of Attorney is used to cover real estate and financial and legal areas, and the Representation Agreement for health and personal care. For certain powers to be effective, such as dealing with real estate matters, your document must be signed by a legal professional.

If you want your living will or advance directive to be legally binding, make a Representation Agreement. For both health and personal care matters, making a Representation Agreement is the best protection for your wishes. It saves delay, avoids conflict and eases the burden on others.

For detailed information about these agreements contact Nidus Personal Planning Resource Centre and Registry at:
Address: 1440 West 12th Avenue, Vancouver, BC V6H 1M8
Website: www.nidus.ca | Email: info@nidus.ca
Phone: 604-408-7414

► ORGAN OR BODY DONATION

You may have some ideas about donating organs or your body for the functional or medical use of others. These ideas need to be discussed with your family and stated clearly, in writing. Contact the BC Transplant Society at www.transplant.bc.ca or email them at info@bct.phsa.ca or call them at 604-877-2240.

Incapacity Planning

A Representation Agreement is a health and personal care document that says who you give authority to in case you need someone to make health care choices when you are unable to do so. It is your legal plan.



► A LEGACY OF LOVE

What is a *Legacy of Love*? A *Legacy of Love* is a planned gift made from assets accumulated during one's lifetime. Rather than writing a cheque from current income these gifts are usually part of an overall estate plan. Planned gifts are typically made one or more of the following ways.

► A WILL

We have already discussed the *Will* which is a legal document which provides for family, the church and other loved ones through a bequest (gift) in one's *Last Will and Testament*. For more information, see the previous pages or ask for our helpful *Wills & Bequests Brochure*.

► GIFT PLUS ANNUITY

The *Gift Plus Annuity* allows a donor to make a charitable donation, increase income for life, lower income taxes, and avoid future investment concerns through a lifetime annuity. In exchange for your gift, the Anglican Church of Canada buys you a lifetime annuity from a licensed insurance company. The amount of your annuity payment depends on your age and the size of your contribution, but the rate will usually be quite a bit higher than what you now get from your investments such as GICs or bonds, and it is fully guaranteed. It will continue as long as you live, no matter what happens to the economy or to interest rates. Call the Stewardship & Gift Planning Office which can provide you with a personal quotation. For more information, ask for our helpful *Annuities, Trusts, Securities Brochure*.

► LIFE INSURANCE

Gifts of life insurance truly make an impact on ministry, often for a very small payment. Donors who want to really make a difference to the lives of people in their faith community choose the gift of life insurance to create that impact because they are able to give significantly larger gifts than they might otherwise be able to make. You can write new insurance or use paid up policies that are an idle asset to create a win-win situation for your financial and estate tax plan and for the Anglican Church. For more information, ask for our helpful *Life Insurance Gifts Brochure*.

► CHARITABLE REMAINDER TRUST

Unlike a future bequest in your will, for which you get no tax benefit now, a charitable remainder trust provides you with a large donation receipt in the year you make your gift and you'll also continue to receive the trust income for life. On your death, the trust asset goes to the church. You can use cash, securities or real estate to fund a trust gift to the Church. For more information, ask for our helpful *Annuities, Trusts, Securities Brochure*.

► APPRECIATED SECURITIES

When you donate appreciated securities to the Church, you get a tax receipt for the full market value of the gift and now pay no tax on the gain derived from gifting the securities. It is one of the most tax-effective way to make a donation. For more information, ask for our helpful *Annuities, Trusts, Securities Brochure*.

► RETIREMENT GIFT PLANS

You may leave your RRSP or RRIF surplus to the church — tax free. Ordinarily the surplus, at death, is taxed as income — often at the highest marginal tax rate. By designating your parish or the diocese as beneficiary, you will be creating a significant gift and eliminating the tax payable on death. Probate fees and will challenges are also avoided by choosing this option. Contact the planned giving office for assistance with retirement plan gifts.

► LIFE ESTATE GIFTS

Gifts of real estate or artwork may benefit you and the church. Call the Director of Stewardship and Gift Planning for more information.

► DONOR-ADVISED FUNDS

The Diocese has a donor-advised fund program where you create a family endowment that is permanently invested in the Consolidated Trust Fund of the Diocese. Each year you or your heirs may specify the church organization or related group that will benefit from the income earned. Please call the Director of Stewardship and Gift Planning for the *Legacy Funds Brochure*.



GIVING IT ALL AWAY



WHO DO YOU WANT TO RECEIVE YOUR ASSETS WHEN YOU DIE?

We are never more generous than when we die. At that moment all of our possessions are given away. What's best about this is that, if you have a *Will*, you get to choose who gets them! Take a few minutes and think about what is most important to you and then fill in the pie chart above according to how you would like your assets and wealth to be distributed. You have

five basic choices: family (spouse, children, etc.), church, charity, friends or government (health, education, etc.). Don't worry about what you actually have in the way of assets... your allocation just needs to add up to 100%. When you are done, ask yourself whether the picture you have made reflects your current estate plan. Do you need to make changes?



PLANNING FOR THE FUTURE

Planning your expenses and income is an important thing to do whether in the retirement phase of your life or in the high earning years. Here is a helpful sheet to help you do that.

Monthly Expenses

Mortgage/Rental	\$	
Insurance	\$	
Utilities	\$	
Income Taxes	\$	
Property Taxes	\$	
House Expenses and Repairs	\$	
Auto Expenses	\$	
Clothing and Personal Care	\$	
Education	\$	
Pledge and Charitable Gifts	\$	
Birthdays/Holidays/Allowances	\$	
Medical and Dental	\$	
Vacation and Recreation	\$	
Other	\$	
	\$	
Total	\$	

Projected Income

	Continues to Spouse		
	Yes	No	Half
Salary/Wages	\$		
Canada Pension Plan	\$		
Old Age Security	\$		
Employee Pension Fund	\$		
Trust Income	\$		
Dividends	\$		
Interest (Bonds, GICs etc.)	\$		
Gift Annuities	\$		
Mortgages	\$		
Property Rentals	\$		
Other (describe below)	\$		
	\$		
	\$		
Totals	\$		

A Letter Regarding My Final Arrangements

To Whoever Takes the Responsibility for My Final Arrangements

In calm recognition of the inevitable, I have given thought to my personal wishes concerning my final arrangements. I feel that the effort I have made to pull information together and state my wishes will minimize the emotional strain on my survivors. I do not wish them to be burdened by the great pressures of having to make immediate decisions on matters that inescapably must be made then if I do not make them now. Difficult though it may be for me to set this down, I feel that my loved ones would find it more difficult to make the decisions with no indication of my specific wishes.

Though these wishes may not be legally binding, I trust that they will help my survivors avoid confusion, extra expense, or at the least any self-reproach that might arise because of doubts, omissions, or commissions.

Signature _____ Date _____

Your Name _____

Your Address _____

Your City _____ Province _____ Postal Code _____



THE FUNERAL LITURGY

Remembering all those wretched funerals I have attended and also the truly beautiful and inspiring ones, I make the following plans. I wish my service to reflect my life, faith, and love.

“The origins of funeral practices, whether burial or other forms of reverent disposal of the bodies of those who have died, are lost in the furthest mists of human history.”

“Funeral practices are unlike some of the other rites and ceremonies of the Church precisely because of their universal nature.”

“It is entirely fitting that Christian funerals reflect these various dimensions of the experience of death.”

“It is important to note that funerals are the property of neither undertakers nor clergy. They belong to the circle of family and friends of the person who has died and, when that circle is Christian, they find an appropriate setting in the larger Christian fellowship.”

“The family and friends of the dead person are encouraged to consult as early as possible with the priest or other person responsible in their parish, as well as with the undertaker who may be involved, to plan the various events which will constitute the funeral.”

THE BOOK OF ALTERNATIVE SERVICES, ANGLICAN CHURCH OF CANADA (PAGES 565–569)

When possible, it is suggested that you fill out the following in consultation with your clergy, providing a copy of these instructions for the church:

Funeral Location

Circumstances permitting, I wish my Burial Service to take place at:

_____ Church

Address _____ City _____ Postal Code _____

I would like the following clergy person to assist my parish priest/deacon with my funeral:

It's the parish priest's prerogative to have the choice of inviting any other clergy to take part.

I wish my funeral to be ☐ Eucharistic ☐ non-Eucharistic

☐ I would like there to be a service of committal at the gravesite/cemetery/memorial garden.

☐ I would like there to be a wake/reception as part of my funeral.

Funeral Service

I would like the following people to take part in my funeral:

- ☐ Pallbearers (if the casket is present) _____
- ☐ Greeters, ushers, sidespeople _____
- ☐ Readers _____
- ☐ Leaders of the prayers _____
- ☐ Eucharistic administrators _____
- ☐ People to give a eulogy _____

I have chosen the following readings, scriptural and non-scriptural.

The Book of Alternative Services (pages 604–605) has a list of suggested funeral liturgy Bible readings.

I have chosen the following hymns (there are helpful suggestions in the subject index at the back of the *Common Praise* hymn book). I would like this music to be played at a suitable point in the service.

My preference is for _____ to be the musician(s), in consultation with my congregation's director of music. *It's the church musician's prerogative to have first refusal.*

1. _____
2. _____
3. _____
4. _____

Memorials

Policy regarding acceptance of flowers within church buildings may vary. Instead of sending flowers, many prefer to make a more lasting memorial. Most parishes have both a general memorial fund and a building fund, as do many other charities. Memorial gifts may also be made to the Diocese of New Westminster or to the specialized programs and ministries of the Diocese of New Westminster.

I would like my family to provide the following flowers for the service:



Burial Information

I prefer to be: 1. ☐ Buried ☐ Ground ☐ Crypt or ☐ Cremated
2. ☐ Before the funeral or ☐ After the funeral

I have prepared a pre-arranged funeral plan with the following funeral director:

I have discussed my funeral plan with my parish clergy, and the church has a copy of my plan on file:

Clergy _____ Church _____ Date _____

Disposal of Ashes (name a favourite place where you may wish your ashes spread):

Location of cemetery lot deed, crypt deed, columbarium contract:

I have made arrangements to have certain parts or all of my body donated to:

Repatriation— If I die outside Canada, repatriate my remains: ☐ Yes ☐ No

Preferred Funeral Director (Name/Address/Phone): _____

Specifications: Casket ☐ Least expensive ☐ Mid-range ☐ Elaborate ☐ Rental Only

Urn _____

Viewing: ☐ I do ☐ I do not wish to have my casket open at the ☐ Funeral Home ☐ Church.

My jewelry should be ☐ left on ☐ removed.

Burial Dress _____

Monument: ☐ Stone ☐ Plaque

Inscription _____

Other information for my survivors: _____

Information For My Family and Friends

Final directions and instructions upon the death of:

_____ Date Prepared _____

File this information where it will be found easily upon your death. It is suggested that you also file this with your local church or your lawyer, and notify your heirs that the form has been completed for their information.

Full Name _____

Address _____

Birth Date _____ Birth Place _____

Baptism Date _____ Baptism Location _____

Spouse's Name _____

Spouse's Address _____

Spouse's Birth Date _____ Spouse's Birth Place _____

Spouse's Baptism Date _____ Spouse's Baptism Location _____

Church Affiliation _____

Name and Address of Parish Church _____

Father's Full Name _____

Birth Date _____ Place _____ Living? ☐ Yes ☐ No

Mother's Full Name _____

Birth Date _____ Place _____ Living? ☐ Yes ☐ No

Names, addresses, and phone numbers of living brothers and sisters:

1. _____
2. _____
3. _____
4. _____

Names, addresses, and phone numbers of living children:

1. _____
2. _____
3. _____
4. _____

Other Dependents:

1. _____
2. _____
3. _____



It is also recommended that you keep an up-to-date address and telephone book.

This can be a big help in notifying others in times of emergency.

Location of Book(s) _____

Name(s), address(es), and phone number(s) of other persons to notify upon my death:

1. _____
2. _____
3. _____
4. _____
5. _____

The following nearby person (s) has agreed to care temporarily for my:

Family _____ Phone _____

Pets _____ Phone _____

My Occupation _____

Employer (Name/Address) _____

Social Insurance Number _____ BC Health Card Number _____

Canadian Forces Service ☐ Yes ☐ No

Entitled to Veteran's Benefits ☐ Yes ☐ No

Service Branch Contact _____ Phone _____

Personal Representative's name(s) and address(es) and phone number(s):

1. _____
2. _____
3. _____

Last Will Executed on _____

Will is located at _____

Executor/Executrix's name(s), address(es), and phone number(s):

1. _____
2. _____
3. _____

Enduring Power of Attorney holder's name(s), address(es), and phone number(s):

1. _____
2. _____

BANK ACCOUNTS

Savings Institution Accounts/Other Income-Producing Accounts.

<i>Name of Institution</i>	<i>Type</i>	<i>Account Number</i>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

JOINT ACCOUNTS

<i>Name of Institution</i>	<i>Type</i>	<i>Account Number</i>
1. _____	_____	_____
2. _____	_____	_____

Safe Deposit Box Number & Location

Location of Safe Deposit Box Key

Other Key Holders

PROPERTY

<i>Description & Location</i>	<i>(Original Cost)</i>	<i>Market Value</i>	<i>Mortgage</i>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

NOTES AND MORTGAGES

<i>Description</i>	<i>Name of Debtor</i>	<i>Amount</i>	<i>Interest Rate</i>	<i>Rate of Payment</i>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

OTHER FINANCIAL OR REAL ESTATE ASSETS

<i>Description & Location</i>	<i>(Original Cost)</i>	<i>Market Value</i>	<i>Mortgage</i>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____



KEY ADVISORS (NAME, ADDRESS OR PHONE)

Priest/Pastor _____

Lawyer _____

Accountant _____

Investment Counselor _____

Estate/Financial Planner _____

Trust Company/Officer _____

Insurance Agent _____

LIFE INSURANCE

<i>Company</i>	<i>Amount</i>	<i>Certificate #</i>	<i>Beneficiary</i>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____

RSPS, RRIFs, PENSIONS

<i>Company</i>	<i>Account Number</i>	<i>Beneficiary</i>
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

LEASES

1. _____

2. _____

CREDIT AND CHARGE ACCOUNTS

<i>Company</i>	<i>Account Number</i>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____

ORGANIZATIONS

Associations/Societies/Unions/Lodges/Professional Association, etc.

(include office or position-past/present, and check if organization is to be notified).

Organization

Notify?

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

☐ Yes ☐ No

PERSONAL EFFECTS

Disposition of personal effects (clothes, jewelry, paintings, bicycle, digital assets such as music, photos, your smart phone, laptop, etc.) unless otherwise specified in the Will. Note: this list expresses your preferences but has no legal standing; in your Will you may incorporate by reference such a list to make it legally binding.

Article

Beneficiary

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DOCUMENTATION

Since the survivor(s) will be faced with many challenges, the following additional documents may be necessary in establishing rights to insurance, pensions, Social Security, ownership, relationship, etc. Indicate location for each item listed.

(H) Home (D) Safe Deposit Box (O) Office (L) Lawyer (A) Accountant (C) Clergy

<input type="text"/> Marriage License/Divorce Papers	<input type="text"/> Legal Proof of Age/Birth Certificate
<input type="text"/> Citizenship Papers/Passport	<input type="text"/> Survivor's Pension Information
<input type="text"/> Bill of Sale for Car/Title, Registration	<input type="text"/> Stocks/Bonds/Mutual Funds/GICs/Other <input type="text"/>
<input type="text"/> Bank Books/Card(s)	<input type="text"/> Will
<input type="text"/> Deeds to Property	<input type="text"/> Insurance Policies
<input type="text"/> Income Tax Returns	<input type="text"/> Representation Agreement
<input type="text"/> Receipts/Canceled Cheques	<input type="text"/> Power of Attorney
<input type="text"/> Military Discharge Papers	<input type="text"/> Separation/Divorce Agreements
<input type="text"/> Automobile Information	<input type="text"/> Other <input type="text"/>



SOCIAL MEDIA INFORMATION

Accounts like email, Facebook, Twitter, LinkedIn, etc., plus other relationships which you have with online providers will need to be cancelled, or they may be values and form part of your estate. List them below so your Executor can look after these situations.

Account/Username

Password

[illegible]

To Do List

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.

Writing Your Obituary

You may want to write your own obituary. It helps to ensure that the things that are important and meaningful to you are included. At the least, it is a good idea to leave a brief biographical account of your life to assist those who will compose your obituary. Use this space to either write your obituary or to note important details you wish to be included.

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.

LITURGICAL RESOURCES

FROM THE BOOK OF ALTERNATIVE SERVICES

page	130	A Prayer for Peace	page	682	A Prayer of Christian Life
	131	A Prayer for Grace and Faith		695	Anniversary of a Baptism
	131	A Prayer for Guidance		696	Anniversary of a Marriage
	681	For the Poor and Neglected		696	For Celebration of a Birthday
	682	For the Aged		697	For Reconciliation in a Home

PLANNED GIVING RESOURCES

You Can't Take it With You: The Common Sense Guide to Estate Planning for Canadians

by Sandra E. Foster (6th Edition; Headspring Publishing, 2016; ISBN: 978-0968947722)

Estate Planning Workbook, A Companion to "You Can't Take it With You"

by Sandra E. Foster (John Wiley & Sons Canada, Ltd., 2002; ISBN: 978-0470831779)

The Canadian Guide to Will and Estate Planning

by Douglas Gray & John Budd (4th Edition; McGraw-Hill Education, 2017; ISBN: 978-1259863417)

BROCHURES AND PUBLICATIONS

- Wills & Bequests Brochure
- Life Insurance Gifts
- Annuities, Trusts, Securities Brochure
- Legacy Fund Endowment Brochure (Donor-Advised Funds)
- Legacy Planner

PLANNED GIVING ASSISTANCE

Diocese of New Westminster
1410 Nanton Avenue, Vancouver, BC V6H 2E2
Website: www.vancouver.anglican.ca
Phone: 604-684-6306
Email: info@vancouver.anglican.ca

ONLINE RESOURCES

Nidus Personal Planning Resource Centre and Registry | www.nidus.ca

BC Seniors Online Website | www.seniorsbc.ca

BC Seniors Guide | www.gov.bc.ca/seniorsguide

Advance Care Planning Guide | www.gov.bc.ca/advancecare

Electronic Law Library | www.clicklaw.bc.ca

Public Guardian & Trustee | www.trustee.bc.ca

BC Transplant Society | www.transplant.bc.ca

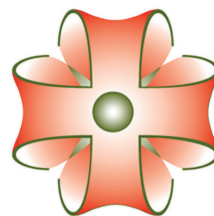
The Good Steward Website | www.thegoodsteward.ca

Seniors Health Care Support Line | 1-877-952-3181

Anglican Initiatives Fund

The Anglican Initiatives Fund enables the Diocese of New Westminster to respond faithfully to God's call to minister in a wide field of mission. It also provides a permanent established fund to which many Anglicans have contributed. Fund Administrators include the Bishop, Chancellor, Diocesan Treasurer, and two others elected at Diocesan Synod. They are responsible for administering the Anglican Initiatives Funds. The fund administrators have the capacity to receive and manage gifts that are intended to be flow-through for designated programs or for distribution of income from endowments as designated by donors.

The mandate of the Fund has four specific areas including Human Resources, Anglican Church Growth, New Ministries, and Outreach Ministry.



ANGLICAN INITIATIVES FUND

Please consider an estate or lifetime gift to support the work of the Anglican Initiatives Fund.
Contact 604-684-6306 for more information.

Ultimate Stewardship

Part of the challenge we all face in making our estate plans and end of life decisions is about how we disburse our possessions given by God during our lifetime to those whom we love and to those things for which we care deeply.

Most people distribute some of their assets to family, which is one option, and many feel strongly that it is the only one. These gifts, for example, may include personal possessions like jewelry or clothing or furniture, or collections of some kind. It may also include financial assets in the form of bequests, gifts during the giver's lifetime, insurance proceeds, etc.

Giving to charity often comes next. Organizations that have best matched the donor's passion for social justice, Christian formation, caring for God's creation, education and liturgical elements like music and art in worship often receive an estate gift.

For Anglicans, leaving some form of legacy to the parish, diocese or national church is also a form of ultimate stewardship. Some tithe their estate, leaving 10% to the faith community to continue God's work. Others leave an amount as an endowment that will generate an annual gift comparable to the gifts they gave during their lifetime. Yet others treat the church as an extra child and divide their estate among four instead of three, or among three instead of two, etc. Some provide all their family and charity bequests in specific amounts and leave the residual to the

church. And there are those with no family, who leave everything to the church.

So, it is an important time in your life. There are decisions to be made and it is best to start early, rather than wait until they *must* or cannot be made due to illness or death. You are encouraged to review this publication carefully and prayerfully, have discussions with family members, make the decisions you need to make, and make a will which shows your intentions now. You can review it every two or three years to make sure it still reflects your wishes and the current situation. Then make the changes needed and rest in the knowledge that you are prepared.





*“Do not neglect to do good
and to share what you have,
for such sacrifices
are pleasing to God.”*

HEBREWS 13:16

For More Information Contact

Director of Finance

Diocese of New Westminster

Anglican Church of Canada

1410 Nanton Avenue

Vancouver, BC V6H 2E2

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