



Catholic Estate Organizer

Stewarding the gift of our lives and our assets for our families and our faith community

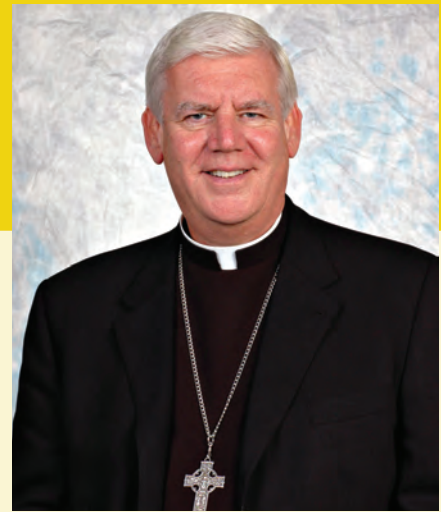


Archdiocese of Regina

A Life of Stewardship

It had been revealed to Simeon by the Holy Spirit that he should not see death before he had seen the Messiah of the Lord. He came into the temple; and when the parents brought in the child Jesus to perform the custom of the law in regard to him, he took him into his arms and blessed God, saying:

“Now, Master, you may let your servant go in peace, according to your word, for my eyes have seen your salvation, which you prepared in sight of all the peoples, a light for revelation to the Gentiles, and glory for your people Israel.” (Luke 26-32)



As members of the people of God, we Catholics have been shaped by an ancient legacy of hope for salvation. Like Simeon, we have spent our lives faithfully waiting, ready to welcome Christ into our lives and waiting for Him to come into our world. We have journeyed together as a people of God over centuries, each person's life a small part of God's plan for His kingdom. Our inheritance is the promise of new life that we received in baptism.

As believers in Christ's resurrection, death has no power over us. Preparing our legal and financial affairs such that we are always ready for God's call is a witness to our life as good stewards of the gifts we have received from the Lord.

Please use this booklet as an aid in praying about the estate planning process and as a way to approach planning for how the gifts of your life, your family and your faith can be stewarded in this life and into the next life.

The guide also contains some information about including gifts to our Church and other Catholic charities in your plans. The most lasting testament that we can leave is the opportunity for others to be touched by the Good News of the Gospel. Passing on our faith to future generations by using some of our abundance to provide for the needs of the Church in her work to evangelize and celebrate the sacraments is a powerful legacy.

You have invested and increased the treasure that was entrusted to you. May the Holy Spirit guide you as you plan to pass these gifts on with wisdom and prudence.

Yours sincerely in Christ,

A handwritten signature in dark ink, reading "D. Bohan". The signature is written in a cursive, flowing style.

✠ Daniel J. Bohan
Archbishop of Regina

Catholic Estate Organizer

Assistance in Consolidating Estate and Other Information Courtesy
of The Roman Catholic Archdiocese of Regina for its members

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I am the resurrection and the life. Whoever believes in me will
live, even though he dies: and whoever lives and believes in me
will never die. – John 11:25-26

Name: _____

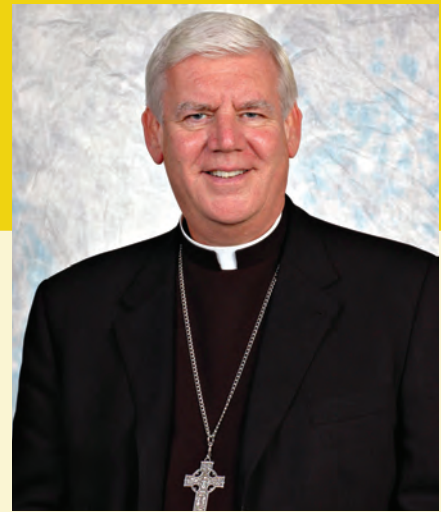
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Date Reviewed: _____

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The Estate Organizer

The Roman Catholic Archdiocese of Regina is pleased to provide this Estate Organizer to members of the Archdiocese to assist you in bringing together, in one place, an inventory of all things God has entrusted to your stewardship. Not only does it assist by indicating where various documents are located but also who has the authority to deal with your affairs in circumstances such as sickness and death.

It is suggested that the Estate Organizer be completed and a copy given to a trusted advisor or family member and a copy kept with your Will. Your estate executor, who is charged with carrying out your last wishes, will find it invaluable since it will eliminate the need for costly and lengthy searches for important details concerning your estate and your wishes.

The Estate Organizer should be updated on a regular basis. In addition, the Property Power of Attorney, the Personal Power of Attorney and the Advanced Health Care Directive should be held by the person or persons who may have to act under the provisions contained in the documents.

Getting Started

Before you begin, gather together the personal documents you will need. Having these documents at hand will make completing this organizer easier for you.

- Social Insurance Number
- Current Last Will and Testament
- Property Power of Attorney
- Personal Power of Attorney
- Advanced Care Directive
- Insurance Policies
- Bank Account and Investment Statements
- Real Estate Ownership Documents
- RRSP/RRIF and Pension Documents
- Names and Addresses of Professional Advisors
- Names and Addresses of Estate Beneficiaries

My Life, My Faith, My Legacy

The days of our life are seventy years,
or perhaps eighty, if we are strong;
even then their span is only toil and trouble;
they are soon gone, and we fly away.(...)
So teach us to count our days
that we may gain a wise heart. (Psalm 90:10-12)

Prayer and reflection on our journey of faith is an important place to start in preparing our estate plans. Jesus calls us to live our lives as the salt of the earth and light of the world (Matthew 5:13-16) – how do we continue to share the Gospel message of love beyond our time here on earth? How can we express our thankfulness and gratitude for God’s blessings in our own planning?

Some questions for reflection are provided below and we invite you to use this space to share the story of your faith walk with our Lord and with those who will receive this document after your passing.

- What is my family’s story?
- Who were some of the people or organizations who helped me to become the person that I am today? (parents, siblings, teachers, friends, school, parish, etc.)
- What would I like to share with others about what it means to live a life of stewardship?
- What do I appreciate most about my spouse, siblings, children, grandchildren, great-grandchildren?
- What were some of the times when I saw the hand of God in my life? What happened?
- What would I like to be remembered by?

It is important to remember that this section is meant as a way of sharing important moments and values in your life. It is NOT intended to take the place of a legal Will. Specific gifts and estate intentions should be included in your Will and not in this section. A legal Will is the document that will be referred to in understanding your specific wishes for the disbursement of your estate.

Con't

Questionnaire

Personal Information

Name: _____

Address: _____

Phone Number (Residence): _____

E-mail Address: _____

Date and Place of Birth: _____

Citizenship: _____

Social Insurance Number: _____

Marital Status: ☐ Single ☐ Married ☐ Widowed ☐ Separated ☐ Divorced ☐ Annulled

Occupation: _____

Employer: _____

Phone Number (Business): _____

Registered Parish Name: _____

Parish Address: _____

Father's Name: _____

Father's Place and Date of Birth: _____

Mother's Name: _____

Mother's Place and Date of Birth: _____

Medical

Saskatchewan Health Card Number: _____

Physician's Name: _____

Address: _____

Phone Number: _____

Specialist's Name: _____

Address: _____

Phone Number: _____

Spousal Information Complete if presently married

Spouse's Name (Maiden Name): _____

Spouse's Address (if different from yours): _____

Spouse's Date and Place of Birth: _____

Citizenship: _____

Date of Marriage: _____ Place of Marriage: _____

Social Insurance Number: _____

Complete if any previous marriage(s)

Spouse's Name: _____

If widowed, date of spouse's death: _____

If annulled, place and date of annulment: _____

If divorced, place and date of divorce: _____

Was there a separation agreement and/or divorce decree? ☐ Yes ☐ No

Are there continuing financial obligations under the agreement? ☐ Yes ☐ No

Did this marriage result in children? ☐ Yes ☐ No

Children's Names: _____

(Keep a copy of any agreements and/or decree with your Will)

Information About Children/Dependants

If there are more than four names, attach an additional sheet of information.

1. Full Name: _____

Address: _____

Relationship to You: _____

Date of Birth: _____ Marital Status: _____

Number of Children: _____ Phone Number: _____

2. Full Name: _____

Address: _____ Marital Status: _____

Phone Number: _____

Relationship to You: _____

Date of Birth: _____

Number of Children: _____

3. Full Name: _____

Address: _____ Marital Status: _____

Phone Number: _____

Relationship to You: _____

Date of Birth: _____

Number of Children: _____

4. Full Name: _____

Address: _____ Marital Status: _____

Phone Number: _____

Relationship to You: _____

Date of Birth: _____

Number of Children: _____

If you have information you wish your estate executors to be aware of (e.g. child with special needs),
provide additional information below:

Information About Your Assets

Indicate if not applicable. Attach an additional sheet for more information about assets if required.

A. Real Estate

1. Principal Residence

Address of Principal Residence: _____

Manner of Ownership: _____

(Alone, Joint Tenants with Survivorship, Tenants in Common, Partnership, through Corporation, etc.)

Original Cost: _____ Approximate Value: _____

Mortgage(s) with: _____ Approximate Balance Due: _____

2. Farm Property

Address of Farm Property: _____

Manner of Ownership: _____

(Alone, Joint Tenants with Survivorship, Tenants in Common, Partnership, through Corporation, etc.)

Legal Description: _____

Located in R.M. of: _____

Original Cost: _____ Approximate Value: _____

Mortgage(s) with: _____ Approximate Balance Due: _____

3. Recreational Property

Address of Recreational Property: _____

Manner of Ownership: _____

(Alone, Joint Tenants with Survivorship, Tenants in Common, Partnership, through Corporation, etc.)

Original Cost: _____ Approximate Value: _____

Mortgage(s) with: _____ Approximate Balance Due: _____

4. Rental, Investment, Business or Other Rental Property

Address of Property: _____

Manner of Ownership: _____

(Alone, Joint Tenants with Survivorship, Tenants in Common, Partnership, through Corporation, etc.)

Original Cost: _____ Approximate Value: _____

Mortgage(s) with: _____ Approximate Balance Due: _____

5. Business

Business Name (in full): _____

Address: _____

Nature of Business: _____

Manner and Percentage of Ownership: _____

(Corporation, Partnership, Sole Proprietor)

Has Buy-Sell or other shareholders' agreement been entered into? ☐ Yes ☐ No

B. Vehicles

Describe, if you intend to deal with any specific vehicles in your Will. (type, value, ownership and original cost)

C. Personal Effects

Describe, if you intend to deal with any specific personal effects in your Will.

Liabilities

List bank loans and other significant debts other than mortgages listed above.

(Do not include normal household debts, e.g., credit card balances.)

You:

1. Creditor: _____ Amount: _____

2. Creditor: _____ Amount: _____

3. Creditor: _____ Amount: _____

Spouse:

1. Creditor: _____ Amount: _____

2. Creditor: _____ Amount: _____

3. Creditor: _____ Amount: _____

Location of Documents

1. Birth Certificate: _____
2. Passport: _____
3. Citizenship Papers: _____
4. Last Will: _____
5. Property Power of Attorney: _____
6. Personal Power of Attorney: _____
7. Advanced Care Directive: _____
8. Insurance Policy Contracts: _____
9. Pension Plan Documents: _____
10. Other _____

RRSP Documents: _____

RRIF Documents: _____

RESP Documents: _____

TAX-FREE Savings Account Documents: _____

OTHER:

Income Tax Returns: _____

Association Memberships:

- i) _____
- ii) _____
- iii) _____
- iv) _____
- v) _____

Digital Memberships and Social Media

Consider creating a list of account usernames and passwords to be included with your Will. Your executor and/or family members could face a lengthy and cumbersome process in deactivating or archiving your accounts without this information.

- List websites where you hold an account and your username
- E-mail Addresses
- How would you like your executor to handle your online and e-mail accounts?
- Is there a message that you would like posted to your social media accounts (ie. Facebook)?

Financial and Other Consultants

Lawyer

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Accountant

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Bank Official(s)

A. Name of Individual and Bank: _____

Location of branch: _____ Phone Number: _____

E-mail: _____

B. Name of Individual and Bank: _____

Location of branch: _____ Phone Number: _____

E-mail: _____

Investment Advisor

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Life Insurance Advisor

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Other than Life (property, critical illness, etc.)

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Type of Insurance: _____

Name: _____

Firm Name and Address: _____

_____ Phone Number: _____

E-mail: _____

Type of Insurance: _____

Other Consultants / Advisors

Name, Phone Number and Topic:

i) _____

ii) _____

iii) _____

Financial Information

Bank Accounts

1. Bank and Branch Address: _____

_____ Phone Number: _____

Account Number: _____

Under my name or joint with: _____

2. Bank and Branch Address: _____

_____ Phone Number: _____

Account Number: _____

Under my name or joint with: _____

3. Bank and Branch Address: _____

_____ Phone Number: _____

Account Number: _____

Under my name or joint with: _____

4. Foreign Bank and Address: _____

_____ Phone Number: _____

Account Number: _____

Under my name or joint with: _____

Safety Deposit Box

Institution and Address: _____

_____ Phone Number: _____

Box Number: _____ Key Location: _____

Who else has access: _____

Address: _____

_____ Phone Number: _____

E-mail: _____

Trusts

Do you have an interest in a trust: ☐ Yes ☐ No

If so, name of trust: _____

Trustee(s) of trust: _____

Address and phone numbers of trustee(s): _____

E-mail of trustee(s) : _____

Beneficiary

Are you the beneficiary of an estate not yet settled: ☐ Yes ☐ No

If so, name of estate: _____

Executors(s) of estate: _____

Address and phone number of executor(s): _____

E-mail of executor(s): _____

Why Make a Will?

A Will is a legal document that sets out how you intend your estate to be handled after your death. Your Will comes into effect only upon your death. During your lifetime, you can change your Will as often as you wish.

Many people postpone making a Will until faced with an unexpected illness or until they are preparing for international travel. Most adults in Saskatchewan do not have a valid Will in place and have thus left their affairs to be managed according to provincial law. It's never too early to make sure our estate plans are in place to offer peace of mind and protection to those we love.

By preparing a Will, you can choose your beneficiaries based on their existing and potential financial needs, as well as their relationship to you. You can establish Trusts and determine at what age your children or beneficiaries will receive their inheritance. You can also make charitable bequests to your Parish, the Archdiocese, Catholic organizations or other charities that have been important to you.

If you die without a Will in Saskatchewan, provincial laws designate who will receive your assets and the amount of the inheritance. Assets do not always “automatically” pass to a spouse or a surviving joint-property owner. The decisions of the courts may not match with your wishes and the process of applying for a court-appointed executor will add time and cost to the administration of your estate.

Selection of an Executor and Guardians

A Will allows you to select an Executor who will be authorized to handle the administration of your estate. He or she can carry out your wishes with respect to your funeral and burial arrangements, make choices to efficiently handle financial matters in your estate, ensure that your assets are invested responsibly and distributed according to your wishes and deal with matters related to income and estate taxes.

A Will is also an important tool for parents with minor children or adult dependents. It allows you to choose who you would like to have legal custody and act as a personal and financial guardian for those entrusted to your care.

Consult a Lawyer

While it is possible to create a hand-written (holographic) Will or use an off-the-shelf kit, it is strongly recommended that you select a lawyer to prepare your Will. He or she can ensure that you meet all the necessary legal requirements. They can provide advice as to whether you are eligible to make a Will and they can navigate the complexities involved in managing your financial affairs.

Review Your Will Regularly

Changes to your personal, family or financial circumstances can affect whether your Will is valid and whether the instructions contained in the document are still relevant. These are some of the life events that may mean it's time to review your Will:

- Significant change in assets (ie. sale of a real estate property)
- Death of your spouse
- Children reaching age of majority or ageing parent becoming dependent
- Change in marital status
- Change in country or province of residency
- Changes in income tax legislation

Details About My Will

Do you have a Will now? ☐ Yes ☐ No

Date of existing Will: _____

The location of my Will is: _____

Name of Appointed Executor: _____

Name of Alternate Executor: _____

The lawyer who prepared my Will is: _____

Address: _____

_____ Phone Number: _____

Does your spouse have a Will? ☐ Yes ☐ No

Date of spouse's Will: _____

Location of spouse's Will: _____

If you do not have a Will now, fill in the next section and bring it with you to lawyer's office:

Proposed Executor/Co-Executors

1. Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

2. Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

Proposed Alternate Executor(s)

1. Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

2. Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

Proposed Guardian of Children under 18 Years Old

Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

Alternate choice for Guardian

Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

Proposed Trustee(s) if Estate Assets to be held in a Trust

Full Name: _____

Address: _____

_____ Phone Number: _____

Relationship to you: _____

In order to prepare to meet with a lawyer to prepare or revise your Will, it is helpful to list the names of those individuals and organizations you'd like to include as beneficiaries:

Individual Beneficiaries

1. Full Name: _____
Address: _____
_____ Phone Number: _____

2. Full Name: _____
Address: _____
_____ Phone Number: _____

3. Full Name: _____
Address: _____
_____ Phone Number: _____

Charitable Beneficiaries

1. Legal Name: _____
Registration Number: _____
Address: _____
_____ Phone Number: _____

2. Legal Name: _____
Registration Number: _____
Address: _____
_____ Phone Number: _____

3. Legal Name: _____
Registration Number: _____
Address: _____
_____ Phone Number: _____

Bequests To The Church

Christ gave us, his disciples, the gift of the Church, through which we have continued his ministry on earth for more than two millennia. Including a gift in your estate for your parish or the Archdiocese is one way that you can help the legacy of those who have gone before us continue for future generations of Catholics.

Your bequest may be arranged as one of the following options:

- A percentage of your estate
- The residue of the estate (an amount from the remainder value after all specific bequests and expenses have been paid out of the estate)
- A specific dollar amount

You also have the chance to decide how you would like the Church to use the bequest when it is received:

An **unrestricted** bequest allows the Church to use your gift where the need is greatest. Unrestricted bequests allow for the broadest possible flexibility.

A **restricted** bequest is a given with a specific purpose in mind. It may be directed in support of a particular parish, ministry program or project. You may choose to direct a gift to your parish by naming the parish specifically or through a restricted bequest to the Archdiocese of Regina. Asking your lawyer to include a “power to vary” clause in the unusual circumstance that the parish or ministry you have chosen is no longer in operation.

It is important that you include the correct legal name and charitable registration number in your documents.

The legal name for the Archdiocese of Regina is: “**Archiepiscopal Corporation of Regina**” Charitable Registration # 106720253 RR0001

The Development Office and/or your parish office is able to provide you with the legal name for your own parish.

And I tell you, you are Peter,
and on this rock I will build
my church. (Matthew 16:18)

Here are some samples of how your charitable bequest may be worded:

I give and bequeath to the Archiepiscopal Corporation of Regina, Regina, Saskatchewan (106720253 RR0001) the sum of \$_____ or _____ % of the residue of my estate to be used for its general purposes at the discretion of the Archbishop of Regina.

I give and bequeath to Name of Parish, City, Province (charitable registration #) the sum of \$_____ or _____ % of the residue of my estate for its general purposes as the parish sees fit.

I give and bequeath to the Archiepiscopal Corporation of Regina, Regina, Saskatchewan (106720253 RR0001), the sum of \$_____ or _____ % of the residue of my estate to be used for (parish name/address or basic description of purpose).

If, in the opinion of the Archbishop of Regina, it should become impossible, inadvisable, or impractical to use this gift for this specific purpose(s), then the Archbishop may in his discretion use the gift to the best advantage for the Archdiocese of Regina, keeping in mind the spirit of the gift intent.

We also encourage you to share your intention to support your Church with your family and those close to you. Your bequest gift is a witness to them of the importance of your faith in your life and sharing this information will assist them in honoring your wishes and your memory in the future.

All bequest intentions and details are kept confidential by the Development Office unless express permission is received from the donor.

We invite those considering a bequest gift to share our contact information with their lawyer or other professional advisors in order to ensure that your intentions are correctly documented.

Tax-Smart Giving

From a tax-planning perspective, the income tax benefit associated with a bequest is used to offset taxes owed by the estate. In addition, the upper-limit of the tax credit that can be claimed by an estate is higher than that which applies to gifts made during one's lifetime allowing you to take greater advantage of the savings generated by a larger gift.

Additional tax savings can come from using appreciated securities like stocks, bonds or mutual funds that are held by the estate to fund the bequest donation. Speak with your lawyer about including a clause that allows the estate executor to use discretion in paying charitable bequests in a tax-efficient manner.

Some other examples of tax-smart giving include gifts using life insurance, an RRSP or RRIF beneficiary designation, a donor-advised fund or creating a charitable trust.

The Development Office of the Archdiocese of Regina is able to discuss these and other options with you, your family and your advisors. Contact 306 352 1651 x220 to speak confidentially with our Development Director.

The Development Office would be happy to provide you or your lawyer with proper legal names and addresses upon request for any other Catholic Agencies, Organizations, Institutions or religious congregations.

Masses In Your Will

Catholics often want to include a bequest in their Will for Masses to be celebrated for the repose of their soul or for family members. This custom is praiseworthy, but it is **IMPORTANT** for you to know that the amount allocated for masses **CANNOT** be used directly by the parish for any of its projects or needs. It must be transferred in the form of stipends, or offerings, to priests who actually offer the Masses.

It is very important to inform your lawyer that Canadian Income Tax law states that a bequest for Masses is not considered a charitable donation. No donation tax receipt can be issued for Masses.

Church law requires that the number of Masses celebrated is equal to the bequest divided by the current Mass stipend (typically \$10 in the Archdiocese of Regina). If the bequest is for a significant amount, this can present a scheduling problem due to the number of requests that are normally received in the average parish. We recommend that you take into consideration the importance of also providing for the material needs of the parish when planning your bequest and suggest the following wording when Masses are requested in your Will.

“I give and bequeath to (name of parish) Roman Catholic Church, (city and province) the sum of (amount of dollars) which said sum shall be used for celebrating Masses for the repose of my soul (and spouse, etc.).”

Organ and Tissue Donations

In Saskatchewan, adults can indicate their desire to be an organ and tissue donor by signing an organ donor card and placing an orange “organ and tissue donor” sticker on their Saskatchewan health services card. The stickers themselves do not guarantee a donation. It is important that someone in your family knows whether or not you want to be an organ and tissue donor, since the decision to donate is left to your next of kin.

According to the Compendium of the Catechism of the Catholic Church, the transplant of organs is morally acceptable for Catholics with the consent of the donor and without excessive risks to him or her. Before allowing the noble act of organ donation after death, one must verify that the donor is truly dead. (Sec. 2296, Sec. 476)

Families should be provided with adequate information, opportunities to ask questions, assistance and time to make an informed decision about organ donation, and with support for grieving.

The Canadian Catholic Bioethics Institute provides more information with their guide “Organ Donation: A Catholic Perspective” which can be found at www.ccbi-utoronto.ca



A Place To Call Home

My life did not begin in the Catholic family, indeed my family was not a church-going family at all. They believed that the church was used for 'marryin' and 'buryin' and nothing else. That does not mean that we were not taught to believe in God and to follow the Commandments. Far from it! Above all, we were taught to respect others and to respect the right of all to practice their own faith in any way they wish.

It wasn't until later in life and after a few ups and downs that I met a wonderful Catholic girl, Linda. Little did I know then that this would be the beginning of a full and wonderful life. As the weeks went by during the time we used to prepare for our 'mixed' marriage, I realized that like Linda, I too was on a faith journey and that I had found the road out of the wilderness of my inner life. As I listened to the Word, I realized that I am not alone. I began to feel part of the greater church family and joined my wife in the Catholic faith.

After we retired, we decided to become more involved as parish volunteers at Holy Trinity. We tried out ministries we'd never tried before like RCIA, helping with weddings, ushering and greeting.

Linda died suddenly soon after we began in these ministries and once again, I was out in the wilderness and alone. With the strength of my faith, the help of my pastor and the warm and very caring help from my fellow parishioners and church family, I once again came out of the wilderness. Today, I find my life is centered around the church and our parish. The chance to uncover talents that I didn't even know I had and to give them to the Lord by serving my parish has brought me great joy and peace.

I decided this year that it was time to include my parish in my estate plans by creating a charitable gift that will be received at the time of my passing. Without gifts like this from others who have gone before me, I know that the beacon of light that this parish has been in my life might not have been there for me. I want to meet my Lord and reunite with Linda knowing that others will be able to find a place where their hearts can find shelter in their own faith journey.

I hope my story will help you to understand how important your gifts of time, talent and treasure can be in the lives of other people, like me.

Shane Hallsworth

Simplified Guide for Executors

This is a basic checklist of the duties that may need to be carried out by the Executor of an estate.

- ☐ Locate the Will
- ☐ Request the Funeral Director's Statement of Death
- ☐ Apply for the Death Certificate

- ☐ Make or carry out existing funeral and burial arrangements in consultation with family members
- ☐ Contact the Pastor at the parish where the deceased worshipped
- ☐ Ask for guidance about the procedures and rites pertaining to a Catholic funeral and burial
- ☐ Inform the funeral home that the deceased is Catholic
- ☐ Consider the parish or an Archdiocesan charity for gifts in lieu of flowers

- ☐ Find an estate lawyer
- ☐ Apply to the court for letters probate
- ☐ Notify the beneficiaries of the death, if necessary, and send a copy of the Will
- ☐ Notify charities of bequests

- ☐ Identify all savings and chequing accounts of the deceased.
- ☐ Notify all financial institutions about the death and obtain up-to-date information about the balances on deposit

- ☐ Locate all insurance policies
- ☐ Notify the insurer(s) of the death

- ☐ Access and list the contents of the deceased's safety deposit box
- ☐ Review the deceased's personal papers to determine all assets and liabilities
- ☐ Prepare a detailed statement of assets and liabilities
- ☐ Arrange for storage and insurance of any assets that require it

Why Make Powers of Attorney and An Advanced Care Directive?

Property Power of Attorney

A mentally competent person may give an enduring Property Power of Attorney to another person or persons. Such a Power of Attorney states that the named attorney may just do about anything in respect to the management of property on behalf of the person giving the Power of Attorney.

If you give a Power of Attorney without restriction, it can be exercised at any time, not just if you become incapable of managing your affairs. A Power of Attorney may be given to one person or two or more and can require multiple attorneys to act unanimously or not. A Power of Attorney may be general, as described above, or it may be specific, but in both cases it may contain restrictions such as an expiry date or a provision that the power may only be used in conjunction with a certificate from a medical doctor attesting to your incapacity to manage your property.

If you have not signed the Property Power of Attorney and you are incapable of managing your affairs, then a family member may have to apply to the court to be appointed guardian or the Office of the Public Guardian and Trustee may be appointed as your guardian as a last resort. To avoid this intervention, it is important to have a Property Power of Attorney in place that names at least one attorney and an alternate.

Personal Power of Attorney

A personal power of attorney allows you to appoint someone to make personal decisions regarding accommodation, nutrition, safety, and who can visit you. You may give general or specific instructions regarding the type of care you would or would not wish.

Your personal power of attorney and property power of attorney can be in one document or separate documents. You can appoint the same persons to be your personal and property attorneys or you can appoint different people. You should advise your attorneys that they are appointed and let them know where the original documents are.

The attorney(s) named in your Property Power of Attorney and your Personal Power of Attorney should be aware that they have been appointed, know your wishes and have an original copy of the Power of Attorney or know where they are located.

Advanced Care Directive

In Saskatchewan you can have a health care directive but it is more commonly referred to as an advanced care directive. This document specified the types of medical treatment you will accept or not accept if you cannot give instructions yourself. You can also appoint a proxy who will make medical decisions for you if you are incapable of making them yourself. You should inform your proxy that he or she is appointed and give him or her an original of the advanced care directive. A directive is not and cannot permit active euthanasia or assisted suicide.

Details About My Property Power of Attorney

Have you granted a Property Power of Attorney? ☐ Yes ☐ No

Does your appointed attorney have an original copy of the document: ☐ Yes ☐ No

If no, where is the document located: _____

Date power granted: _____

Name of appointed attorney(s): _____

Contact details of attorney: _____

Name of alternate attorney(s), if named: _____

Contact details of attorney: _____

Details About My Personal Power of Attorney

Have you granted a Personal Power of Attorney: ☐ Yes ☐ No

Does your appointed attorney have an original copy of the document: ☐ Yes ☐ No

If no, where is the document located: _____

Date power granted: _____

Name of appointed attorney(s): _____

Contact details of attorney: _____

Name of alternate attorney(s), if named: _____

Contact details of attorney: _____

Details About My Advanced Care Directive

Have you signed an Advanced Care Directive? ☐ Yes ☐ No

Your proxy requires an original of your advance care directive, have you given him or her one? ☐ Yes ☐ No

If no, where is the original? _____

Date advanced care directive signed: _____

Name of appointed proxy: _____

Contact details of proxy: _____

Name of alternate proxy, if named: _____

Contact details of alternate proxy: _____

Remember

If you are admitted to hospital for surgery, please call your parish priest if you wish to receive the Sacrament of the Anointing of the Sick. Upon admission to hospital, identify yourself or have your family members identify you as Catholic. Ask to have the hospital chaplain be made aware of your presence or if there is no Catholic chaplain at the hospital, please notify the parish priest that you are there. Formerly known as the "Last Rites" the Sacrament of the Anointing of the Sick can be requested at any time, the gravity of the illness or injury does not matter.

Catholic Funeral Planning in the Archdiocese of Regina

The true significance of death is revealed in the light of Christian faith. Death, for a Christian, is the gateway to eternal life in Christ. St. Paul reminds us not to grieve as those who have no hope, for we are given hope and comfort in the resurrection of Jesus Christ from the dead, (cf. 1 Thessalonians 4:13-17).

The pastoral care of the Church and its funeral rites are directed towards a proclamation of faith. In the **Order of Christian Funerals (OCF)** we find directives for the celebration of funerals and discover the following:

At the death of a Christian, whose life and faith was begun in the waters of Baptism and strengthened at the Eucharistic table, the Church intercedes on behalf of the deceased because of its confident belief that death is not the end nor does it break the bonds forged in life.

The Church also ministers to the sorrowing and consoles them in the funeral rites with the comforting Word of God and the Sacrament of the Eucharist.

Christians celebrate the funeral rites to offer worship, praise, and thanksgiving to God for the gift of a life that has been returned to God, the author of life and the hope of the just.

The Church through its funeral rites commends the dead to God's mercy and pleads for the forgiveness of their sins.

The Funeral Rites of the Church

The **Order of Christian Funerals** provides three distinct rites through which the Church intercedes, consoles, offers thanksgiving, and expresses the Christian faith in eternal life and in the Communion of the Saints:

Vigil for the Deceased

Funeral Liturgy

The Rite of Committal

Guidelines for the Celebration of the Funeral Liturgy

The priest or pastoral minister with whom funeral arrangements are made will help the bereaved family in making choices in conformity with the funeral rites themselves, thus drawing on the consolations of faith in Jesus Christ.

The Place of the Funeral

The proper place for the funeral liturgy is in the church of the parish community to which the deceased belonged. Normally, this should be a funeral Mass.

Funeral Masses on Sunday

In Canada funeral Masses may be celebrated on any day other than Sundays, Christmas Day, New Year's Day, Holy Thursday, and during the Easter Triduum (from the Mass of the Lord's Supper to Easter Sunday inclusive).

Symbols of Our Faith

When the body is brought to the Church, any symbols that may have adorned the coffin, such as national flags or insignia of association to which the deceased belonged, are removed in favour of the pall. In this way the unique dignity given in Baptism and the fundamental equality of all before God is symbolized.

Scripture Readings

The readings for the Mass are always taken from the sacred Scriptures. Only passages from the Scriptures can be proclaimed during the funeral liturgy. Other poetic or devotional readings may be shared during the reception following the Mass.

Eulogies at Funerals

Catholics may be surprised to learn, as they prepare for the funeral liturgy, that there is no provision for a eulogy in the ritual. The General Introduction to the Order of Christian Funerals quite clearly states that the homily after the gospel reading is never to be a eulogy. The fact that a eulogy is not permitted does not mean that there can be no reference to the deceased person during the homily.

Cremation

Even though the Church retains its preference for the burial of the body after the example of Christ's own burial, permission has been granted for Catholics to be cremated. If the choice for cremation is made, the Church strongly encourages Catholics to have it take place after the Mass of Christian Burial has been celebrated.

The Church asks that all cremated remains be buried in a grave. The scattering of cremated remains, their separation for placement in different locations, or keeping them in homes does not display appropriate Christian reverence and hope and should therefore be avoided.

The Archdiocese of Regina has in-depth information on Catholic Funeral Planning that can be accessed online at www.archregina.sk.ca or by request at 306-352-1651.

Funeral and Cemetery Information for Your Executor(s)

I have pre-arrangements with a Funeral Home: ☐ Yes ☐ No

My arrangements have been paid in full: ☐ Yes ☐ No

Name of Funeral Home : _____

Address: _____

_____ Phone Number: _____

I wish to have a Catholic funeral mass at (name of parish): _____

I have pre-arrangements with the cemetery: ☐ Yes ☐ No

Name of the cemetery: _____

Address: _____

_____ Phone Number: _____

I do not have pre-arrangements for my burial, but if possible, I would like to be buried at: _____

_____ Cemetery.

I have interment rights for a grave, lot, crypt or niche at: _____

_____ Cemetery.

Grave / Lot / Crypt / Niche Location: _____

I would like my marker to read: _____

I have pre-prepared an obituary notice: ☐ Yes ☐ No

Location of document: _____

Memorial Gifts:

☐ I would deeply appreciate it if my loved ones were to designate that at my funeral all in-lieu-of-flowers donations made in my memory be directed towards:

☐ My Parish (Name/City): _____

☐ Archdiocese of Regina

☐ Archdiocesan Annual Appeal (may choose to name a specific ministry): _____

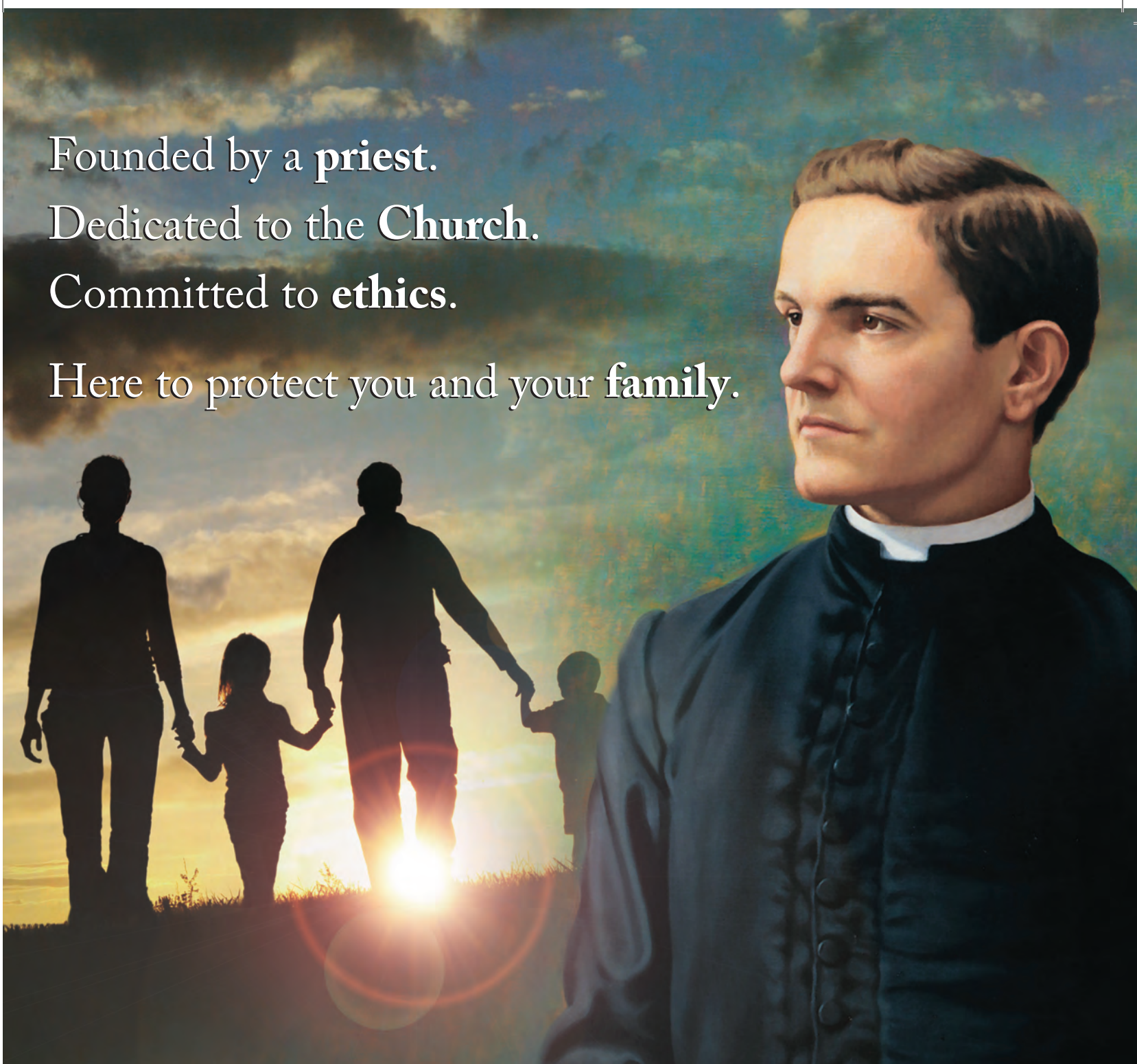
☐ Other Catholic Charity: _____

☐ Other: _____

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