

Worksheet 1

After you're gone: clarifying your vision

It's the day after your death. Describe what a safe and secure life will look like for your relative.

List ten words to describe a typical day for your relative, in the best of all possible worlds.

Use some key words to describe your worst nightmare for your relative after you're gone.

What is the most important message you want to leave your relative with a disability? _____

What do you want your survivors to help with after you've gone? _____

When your executors/trustees meet, what do you want them to do first? _____

What are the three priorities you want future caregivers to remember about your relative?

1. _____

2. _____

3. _____

What are the important arrangements you've made to ensure a good life for your relative? _____

How do you want to be remembered by your relative? _____

Worksheet 2

A family portrait

Use this worksheet to develop a portrait of your relative as it will be an important record to pass on to your survivors.

Health

List names of current doctors, specialists, and health practitioners: _____

List current health concerns: _____

List current health treatments: _____

List current health precautions and alternatives: _____

Briefly describe key features of your relative's medical history: _____

Education and work

List your relative's current educational and/or work activity: _____

What are their future dreams in this area? What other possibilities would they like to explore?

What are some highlights from your relative's school experience? What did they like about it?

What didn't they like about it? _____

Who are the people from the past that your relative would like to connect with?

Who are the people with whom your relative still has a close connection with?

What are some highlights of your relative's work experience? What did they like about it? What

didn't they like about it? _____

Housing

Describe your relative's current living arrangements: _____

What are some future housing options/possibilities for your relative? _____

Summarize their previous living arrangements: _____

What did your relative like about them, dislike about them? _____

Who are the people who had a significant relationship with your relative in these previous living arrangements? _____

Leisure and recreation

List your relative's current social, recreational, cultural, artistic, and athletic activities: _____

What are your relative's interests and preferred activities in these areas? _____

What are some future possibilities in the area of leisure and recreation? _____

What does your relative most like to do? _____

Personal

How would you describe your relative's beliefs and values? _____

What customs and traditions are important in your family? _____

Is spiritual and religious worship important for your relative? Is this an area that could be explored further? _____

What are (or will be) the significant events, markers, or milestones in your relative's life? _____

What brings comfort and peace to your relative? _____

Who has been your relative's greatest source of emotional support other than yourself? _____

What does your relative gain the most pleasure from? _____

Who are the most significant people in your relative's life? _____

What are your relative's favourite possessions? _____

Worksheet 3

A letter to the future

The last wishes of family members are honoured and respected in our society.

A letter to the future is your opportunity to tell your survivors how you would like to be remembered, and how you would like your relative with a disability to be cared for.

This is not an easy letter to write. Think of it as the letter you might write in the middle of the night when you can't sleep. Be frank about your hopes and fears. Tell those who will survive you what's most important to you.

Dear _____,

With love,

Worksheet 4

Relationship circles

For most of us, relationships with family and friends are what keep our lives on track. We have a whole range of relationships—family, partners, lifelong friends, work colleagues, neighbours, people with whom we share an interest, right through to people whom we pay to provide services.

For people with disabilities, these relationships are equally important but can sometimes be challenging to create.

We needn't leave friendships and relationships to chance. We can be really intentional and make it easier for people with disabilities to strengthen their networks. We can do this by enabling them to go to places where they can engage in existing or new interests, hobbies and passions, and have the opportunity to meet people who share these interests.

Use the relationship circles tool on page 56 to look at the people your relative already has in their life. It will help to map out their community as well. It can be completed one-to-one, or with family and friends, or even brought to a network meeting to complete as a group.

In the relationship mapping diagram, the concentric circles are used to plot out relationships. Marsha Forest, Jack Pearpoint and Judith Snow describes these circles as:

- The circle of **intimacy**
- The circle of **friendship**
- The circle of **participation**
- The circle of **exchange**.

CIRCLE 1 The circle of intimacy is concerned with loving relationships and the anchors in your relative's life. In here, go the people your relative cannot imagine life without. Typically Mom, Dad, partner, closest friend, children. Your relative doesn't need to get on with them all the time!

CIRCLE 2 The circle of friendship is concerned with the friends and allies of your relative. Good questions to ask your relative are: Who do you call when you've got good news? Who do you moan to when you've had an argument with your partner/your parent(s)? Who do you draw strength from, share a laugh with, and share your dreams with?

CIRCLE 3 The circle of participation is concerned with shared interests and a neighbourhood connection. In here are people your relative knows from clubs, committees, work, and so on. **NOTE** This circle is particularly important because it is the building block for circles 2 and 1. The more connections made in this circle will increase the likelihood of building meaningful connections in circles 2 and 1.

CIRCLE 4 The circle of exchange is concerned with paid relationships. In this circle are people like your relative's doctor, dentist, window cleaner, hairdresser, taxi driver, and so on.

What will emerge when your relative's diagram is complete is a picture of how your relative's network is or isn't in balance. For example:

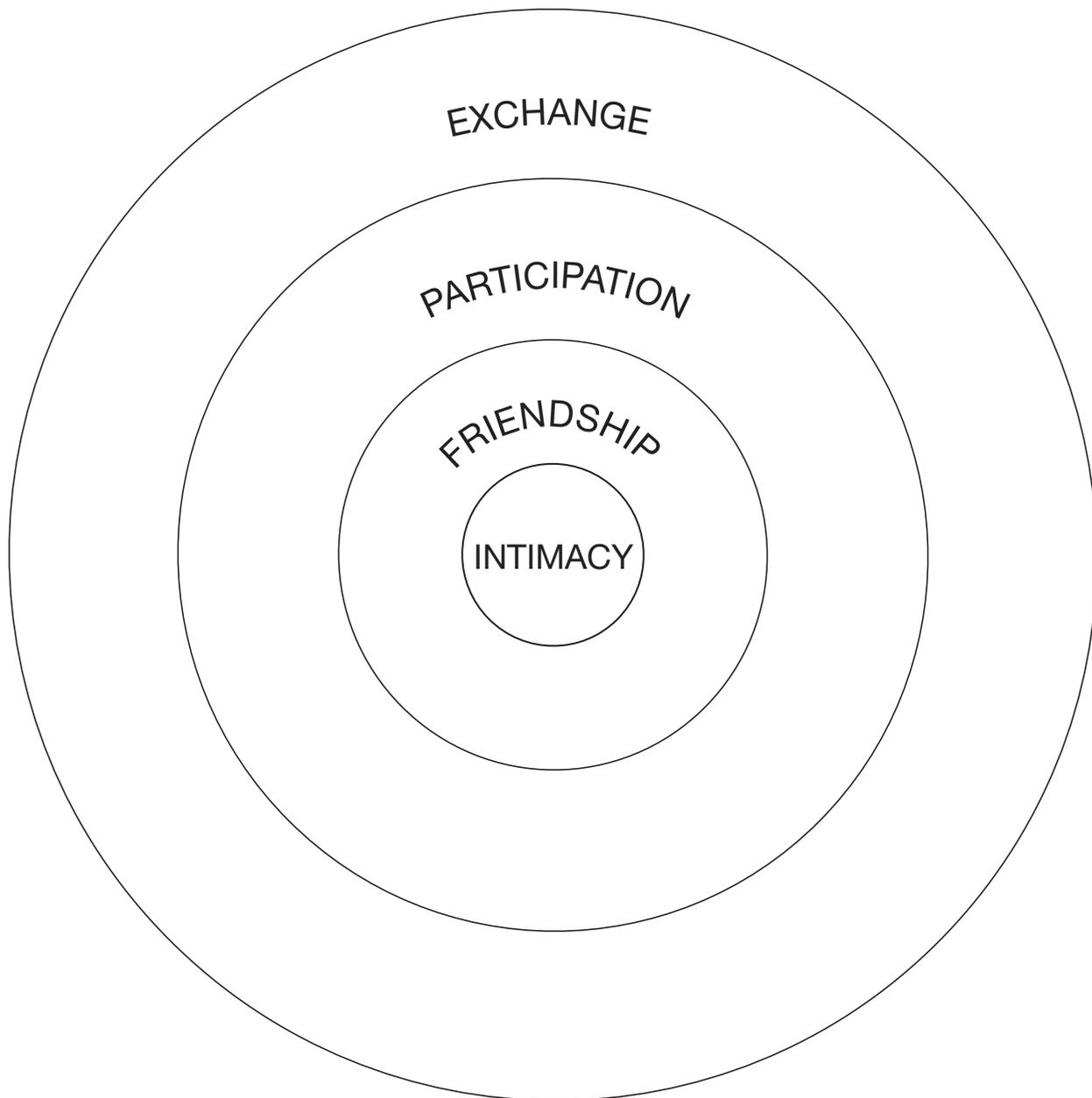
- many people with disabilities have the same number as other citizens in Circle 1, but few in Circles 2 and 3 and markedly more in Circle 4
- some people with disabilities spend most of their lives with people who are paid to spend time with them, that is, those in the outer circle, the circle of exchange.

The main strategy for strengthening the inner circles is to bring people in to Circle 3, the circle of participation. These are people who spend time sharing an activity of mutual interest—anything from working together, playing a sport, sharing an art or craft activity, to going out for a meal together or going to the theatre.

Through participation, people become friends over time.

We also know that people don't come straight into Circle 2, the circle of friendship. Friendship doesn't happen instantly.

Relationship Circles



Worksheet 5

Contribution

The following questions may help you identify the various ways your family member makes or could make a contribution.

We suggest you answer these questions and then share with your family member and others who know them well.

What contribution does your relative make to your family?

What are the three activities they love the most?

What are their passions?

What gives them the greatest joy and pleasure?

Who are their heroes?

What famous public personality (singer, actor, athlete) do they like?

What are their gifts of doing?

What are their gifts of being?

What would they like to learn?

What could they teach others?

What have you learned from them?

What positive attributes do others like about them?

What is the greatest accomplishment of their life so far?

What job or volunteer position would best suit their interests and personality?

Worksheet 6

Spirituality

Those who have a religion or spiritual world view may use this worksheet to reflect on the things that make a good spiritual life for their family member with a disability.

Faith communities can provide a starting point for building relationships or networks.

Whether we practice spirituality formally or informally, the human spirit always needs to be nurtured.

We hope this worksheet will help put the pieces together to answer the question, "Who will ensure that the beliefs that our family member has developed over the years are continued when we are no longer around?"

Is going to a place of worship important to your family member? _____

How often do they like to go? _____

Do they need support to get there? _____

Where is that place? _____

Who is the main contact person? _____

Name and contact details _____

Is there any other organization connected with their faith that they wish to be a part of?

Do they need support to do this? _____

Who is the main contact person? _____

Name and contact details? _____

Does your relative's spiritual belief system involve any special dietary requirements?

If so, please explain.

Are there daily habits, for example prayer at mealtime, that are important to your relative?

What kind of support is needed to make this happen?

Are there any icons or pictures that should be with your family member, either in their house or carried or worn by them to keep their faith alive? _____

Are there any special days or festivals that should be celebrated? _____

How should this be done? _____

Is there anything else about your relative's spiritual belief system that should be noted?

Is there anything needed to make communication easier at the place of worship?

Is your family member accepted by the other worshippers? _____

Is anything needed to make full participation easier, for example, a loop system, large print books, and so on? _____

Are there any physical barriers that prevent full participation? _____

If you are not around at the time of your relative's death, have you left instructions about the wishes for the type of funeral it should be? _____

Worksheet 7

Welcome mat

These are questions you can discuss with your relative. Have some fun and use a variety of props to facilitate your discussion: perhaps have your relative draw a few pictures or make a collage of cutouts from magazines.

What kind of home would you like to live in? _____

Would you like to live by yourself or with other people? _____

Who would you like to help you live in your own home? _____

What would this person help you with? _____

Where do you want to live? _____

Why do you want to live there? _____

What do you want to live close to? (a park, church, recreation centre, bus route, shops, and so on.) _____

What is your favourite room? _____

Do you have a favourite chair? Would you like to have one? Which room would you place it in?

Where would you place your favourite things? _____

What kind of furniture will you need for your own place? _____

What furniture from your family home would you like to have in your own home? _____

Would you keep a pet? What kind? _____

Would you like a garden? _____

Do you like to cook? If so, would you like to have a big kitchen? _____

Would you like to have a quiet room? _____

Which room would you like to have music in? _____

Do you like doing dishes? _____

Do you like to clean the house? _____

Do you like to mow the lawn? _____

How would you decorate:

Your living room? _____

Your bedroom? _____

Your entrance? _____

What colour would you paint the outside of your house? _____

How would you welcome visitors to your home? _____

When you came home at the end of the day, what would be the first thing you would do?

Worksheet 8

When is a house a home?

Here are some simple guidelines and questions to help you evaluate the home-like quality of residential services.

Whose house is it?

Are the individuals who live in the house the ones to determine its structure and tone or is the house geared to suit the staff hired to provide service? For example, are there pictures and other personal mementos scattered throughout the house or are these personal items restricted to the individual's bedroom? Do the staff use their computers in the home as if they were working in an office?

Use your home and your own life as yardsticks for comparison. Do not accept, "well, it's better than where they were." Instead, ask yourself, "Is it as good as I have now?" and "Is it as good as I would want for myself?"

Look around

Are there locks where they are not needed; that is, on the refrigerator, on the clothes closets, and so on?

Are there no locks where they are needed; that is, on bathroom doors, bedroom doors, filing cabinets, medicine cabinets, and so on?

Do people have the same amount and variety of possessions and personal articles as other people their age?

What does it feel like?

Are the rooms comfortable? How about the couch? The chairs? Could you relax here? Does the place feel like a home?

Take a moment to listen

Can you go somewhere for a little peace and quiet? Are there conversations among the people who live here?

Smell

Do you get a scent of home made dinner on the stove or dessert in the oven, or do you smell institutional cleaners and odors?

Taste

Would you enjoy the food that is served or would you merely tolerate it?

Ask

What are the rules? Are they excessive or overly restrictive? Do they make sense to you? Who makes the rules?

Infer

Do the people who live here experience a home with some added support, programming, and needed supervision? Or do they experience an institutional program with a few home-like qualities?

Analyze

What compromises have been made in the name of budget limitations, programming practices, staff needs, and so on? In what ways do these compromises detract from a home-like atmosphere?

Ask yourself

If an opening came up tomorrow, would I ask to move in?

Worksheet 9

Supported decision-making

Use this worksheet to organize key decision-making information, issues, and resources that affect the choices and safety of your relative.

A. Checklist

MEDICAL DECISION-MAKING

Who is my relative's doctor? _____

What assistance would they need to make medical decisions? _____

Who would my relative accept to assist with medical decision-making? _____

What aspect of their medical care do I think my relative might understand? _____

What formal arrangements do I need to make to ensure medical care is easily available to my relative? _____

The independent agency that monitors services is: _____

My relative's advocate is: _____

Who would be willing to assist my relative in making lifestyle and personal care decisions?

- | | | |
|-----|----|--|
| YES | NO | I have discussed issues of medical consent with my relative's doctor. |
| YES | NO | The doctor accepts consent from my relative for medical treatment. |
| YES | NO | The doctor accepts my consent for medical care on my relative's behalf. |
| YES | NO | My family member has an advocate(s). |
| YES | NO | The services my relative receives are monitored by a separate and independent agency. |
| YES | NO | Housing supports are kept separate from other services. |
| YES | NO | Staff understand and support the importance of family involvement. |
| YES | NO | Staff understand and welcome the involvement of spouses, friends, and members of the Personal Network. |
| YES | NO | Service and program staff recognize the importance of offering and respecting my family member's choices. |
| YES | NO | Family and friends provide support by reviewing services and programs on a regular basis. NOTE This is different from the service plans developed by service providers. |
| YES | NO | Members of the Personal Network are familiar with the personal care issues. |

FINANCIAL DECISION-MAKING

YES NO My relative has an informal trustee arrangement in place.

YES NO My relative has an Enduring Power of Attorney place.

YES NO I have set up an income trust.

YES NO I have set up a trust (discretionary or non-discretionary).

YES NO My relative has an RDSP.

YES NO My relative has a bank account.

YES NO Withdrawals from that bank account are protected by:

- joint signature for withdrawals
- my family member is well-known to bank employees
- funds in the account are kept to a minimum
- don't need to be protected.

B. Information

GENERAL

Who does my relative trust? _____

Who would I trust to assist my relative with decision-making? _____

Who understands my relative's communication style? _____

FINANCIAL DECISIONS

My relative's trustees are: _____

My financial advisors are: _____

My relative has the following bank accounts: _____

Signing authority includes: _____

Who would be willing to assist my relative in making financial decisions? _____

I have asked the following individual to monitor the trust I have set up for my relative: _____

Worksheet 10

Will planning

This worksheet is intended to:

- assist you in compiling information to take to your lawyer when you wish to make your Will
- assist in making you aware of decisions you will need to make and to help you make them.

After completing the worksheet you will be ready to contact a lawyer of your choice to make the Will. This worksheet does not give any legal advice. To draft a Will, you need to see a qualified lawyer.

A. Personal and Family Particulars

Date _____

1 Full Name _____

Address _____

Occupation _____

Home Phone _____ Office Phone _____

Date of Birth _____ Place of Birth _____

Citizenship _____

Marital Status (including plans to marry) _____

Date of Marriage _____ Place of Marriage _____

Do you have a marriage contract? _____

Have you or your spouse been married or lived in a common law relationship before? _____

2 Marriage or Common Law Relationship _____

Spouse's Full Name _____

Address _____

Occupation _____

Home Phone _____ Office Phone _____

Date of Birth _____ Place of Birth _____

Citizenship _____

3 Children (Please list all children of either spouse. Please note with a * any child of a former marriage of either spouse and with ** any child with a disability. Please include children you have adopted and children of any previous marriages or common law relationships.)

Full Name

Date of Birth

4 Other Dependents

Is there someone who is dependent upon you for financial support for whom you wish to provide, such as an elderly parent? _____

If yes, please complete the following:

Full Name _____

Address _____

Relationship _____

5 Other Responsibilities

Are you now serving as the legal guardian or trustee for an adult who has a disability or lacks capacity? _____

If yes, full name, address and relationship to you:

Full Name _____

Address _____

Relationship _____

Relationship to you _____

B. Will Particulars

1 Appointment of Guardian(s) for Infant Children

Do you have a child under the age of 18?

It is important to note that you **CANNOT** appoint a guardian for your child with a disability who is older than 18.

Who will be their guardian(s) should you die before they reach age 18?

| Name | Address | Relationship to you | Occupation |
|------|---------|---------------------|------------|
| | | | |
| | | | |
| | | | |

Who will be their alternate guardian(s) before they reach age 18?

| Name | Address | Relationship to you | Occupation |
|------|---------|---------------------|------------|
| | | | |
| | | | |
| | | | |

2 Distribution of Your Estate

(a) Do you wish to leave your estate to your spouse if he/she survives you? _____

(b) Do you wish to share your estate between your spouse and your children? _____

If so, how? _____

(c) If your spouse dies before you, do you wish to leave your estate to your children? _____

If so, in equal shares? _____

If in unequal shares, what proportion or amount is each child to get? _____

(d) At what age do you wish your children to receive their share? _____

(e) If any child fails to survive to that age, do you wish his or her children to receive the share?

(f) If one of your children dies before you do, who do you wish to receive his or her share of your estate? _____

(g) If your spouse and children all die before you do, who do you want to receive your estate? _____

3 Establishing a trust for someone receiving AISH benefits

(a) Do you have a relative who is in receipt (or likely in the future to be in receipt) of AISH benefits? Yes No

(b) Do you wish to set up a trust for this relative? Yes No

(c) Do you wish it to be a discretionary trust? Yes No

(d) Who do you wish to be trustees of this trust?

| Name | Address | Relationship to you | Occupation |
|------|---------|---------------------|------------|
| | | | |
| | | | |
| | | | |

NOTE You may have any number of co-trustees. You should discuss with your lawyer whether you want each trustee to be a co-trustee or an alternate trustee. You should also discuss with your lawyer the ability of your named trustees to appoint additional or successor trustees.

(e) Who do you wish to be alternate trustees if any of the ones you have named are unable to serve?

| Name | Address | Relationship to you | Occupation |
|------|---------|---------------------|------------|
| | | | |
| | | | |
| | | | |

(f) Residual Beneficiary

When you set up a trust you must specify what happens to the assets left in the trust when the person whom the trust was set up for dies.

Who do you want to receive the assets left in the trust when the person for whom the trust was set up for dies? _____

Does this cause a conflict of interest? _____

You should make sure you discuss a potential conflict of interest with your lawyer.

(g) Trustee Powers

Do you wish your trustee to be able, if it becomes necessary or desirable, to buy, sell, rent, lease, or mortgage a residence for your relative with a disability? _____

If so, make sure you discuss your wishes with your lawyer. They will need to ensure they give the powers you want to your trustees.

Do you wish to give your trustees unrestricted investment powers to allow them to make any investment they think is appropriate? _____

Or

Do you wish them to be restricted in what they can invest? _____

It is important to discuss with your lawyer the powers you wish to give to your trustees.

Do you want to leave a particular asset to a particular person? This includes clothing, jewelry, art, etc. If so, describe below. _____

Do you want to give a cash gift to anyone? If so, describe below.

Do you want to give cash or another gift to charity? If so, describe below.

You must be aware that some assets can pass outside of your Will.

Have you filed a beneficiary designation with the plan issuers for your:

- a) RRSP Yes No
- b) RRIF Yes No
- c) Pension Plan Yes No
- d) Life Insurance Policy Yes No

If so, these items will pass outside of your Will.

Do you own any other assets, for example property, bank accounts, etc. jointly with another person? Yes No

If so, these items will pass outside of your Will.

4 Additional Support for your relative

Do you wish PLAN to provide support for your relative when you are no longer able to do so? If so, contact PLAN to discuss incorporating appropriate clauses into your Will that will enable PLAN to assist your relative.

5 Other Comments or Instructions

This is for additional information, which your lawyer might need to consider.

C. Asset and Debt Summary

(please indicate if these assets or debts are not in Alberta)

| | Hers | His | Both |
|---------------------------|----------|----------|----------|
| a) Cash and Term Deposits | \$ _____ | \$ _____ | \$ _____ |

b) Life Insurance

| Insurance Co | Owner of Policy | Designated Beneficiary | Amount |
|--------------|-----------------|------------------------|----------|
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |

c) RRSPs

| RRSP Institution | Owner of RRSP | Designated Beneficiary | Amount |
|------------------|---------------|------------------------|----------|
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |

| | Her name | His name | Joint Names |
|------------------------------|----------|----------|-------------|
| d) Stocks and Bonds | \$ _____ | \$ _____ | \$ _____ |
| e) Pension Plans & Annuities | \$ _____ | \$ _____ | \$ _____ |

f) Describe any interests you may have in any proprietorships, partnerships or private companies. _____

g) Real Estate

| | No.1 | No.2 |
|---------------------------------|--|--|
| Address | _____ | _____ |
| Registered Owner(s) | _____ | _____ |
| Joint Tenants? | _____ | _____ |
| Estimated Value | \$ _____ | \$ _____ |
| Mortgage Balance (estimated) | \$ _____ | \$ _____ |
| Mortgage Life Insured? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Approximate equity | \$ _____ | \$ _____ |

h) Personal Effects

Approximate value of household goods, furniture, jewelry, boats & automobiles: \$ _____

Are any of these articles owned jointly with someone else? Yes No

i) Miscellaneous

A) Interest in any existing estate or trusts: _____

B) Other substantial assets: _____

C) Do you have any real or personal property outside of Alberta? If so, please specify.

D. Summary of Debts (other than mortgages previously noted)

| Creditor | Life Insurance | Amount |
|----------|--|----------|
| _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ _____ |
| _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ _____ |
| _____ | <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ _____ |

Estimated Net Value of Estate

| | Her name | His name | Joint Names |
|---------------------------|----------|----------|-------------|
| Total Assets | _____ | _____ | _____ |
| Less Total Debts | _____ | _____ | _____ |
| Less Estimated Tax | _____ | _____ | _____ |
| Liability | _____ | _____ | _____ |
| Total Net Value of Estate | \$ _____ | \$ _____ | \$ _____ |

Worksheet 11

Your summary checklist

I have completed all the following documents:

- A family portrait of my relative.
- My letter to the future, clarifying my wishes.
- A list of my relative's documents: birth certificate, social insurance card, health care card, etc.
- An up-to-date Will that reflects my current wishes.
- A description of the purpose of the trust.
- An up-to-date list of my major assets and where they are kept (insurance policies, bank accounts, stocks, mutual funds, and so on).

and

- I have stored all these documents in a safe place.
- My executor knows where these documents are kept.