



# *Legacy Planner*





# Legacy Planner

*This is a manual to assist you in putting your personal affairs in order, including possible legacy stewardship, in thanks to God for the gifts and blessings given to you.*

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COVER

**A representation of the official flag of the Anglican Church of Canada.**

## 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, 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.

For married couples, each spouse should compile separate information and prepare separate documents, although many of the materials will be the same.

This booklet can help you make decisions about what is to happen to your assets and your corporal self at the time of incapacitation or death. It also provides a place to make and keep a record of the information others would need. 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* Manual can also be found at the website for the Diocese of New Westminster:

[www.vancouver.anglican.ca](http://www.vancouver.anglican.ca)

## Documents Needed: Ordering Your Affairs

### Will

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.

Steps to take before seeing the Lawyer:

Before you contact a lawyer to draw your Will,

1. Make a list of every person for whom you have responsibility
2. List every person that you would like to remember in your will
3. Make a list of all your material assets
4. Make a list of all your debts and financial obligations
5. Calculate your net worth
6. See the “Giving It All Away” exercise on page 11 to determine how you want to distribute your estate.
7. Ask your chosen executor and/or executrix if he and/or she is willing to serve.
8. Speak to the people you have chosen as guardians for your minor children.
9. Talk with your Rector or priest about ministries of the church that could best benefit from a bequest in your Will.

After giving thought to what you wish to accomplish with your estate plans, contact your lawyer to have your Will drawn up. Making 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—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) is invalid. A handwritten Will, not witnessed, is not usually valid in BC.

When the survivor — or any unmarried person — is called to his or her reward without a Will, the Public Guardian & Trustee in the Province of British Columbia decides what is to be done with the assets in



accordance with the laws of the province. What difference does it make? Won't the Trustee give your assets to your next of kin? Probably, 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 Trustee will decide according to a formula. It will not consider the special needs of any of your family members.

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: moving to another province, your children mature, a family member is born or dies, your executor moves away or becomes incompetent, you retire, etc. If you marry after the date of your most recent Will, you will need to make a new Will.

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.

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 it can be located, should your copy go missing.

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 reminds Anglicans “. . .to liberally give alms to the poor.” (p. 714, 1959) 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.

## Christian Preamble

### Witnessing to one’s faith while doing 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 (use any of the suggested wordings below to specify how to make your gift.) 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 organization(s) they support through a bequest in their Wills. Working with your lawyer, please use whatever seems appropriate to you.

## **Suggested Bequest Wordings**

The Diocese of New Westminster and its parishes and related groups are pleased to provide the following suggested bequest wordings for your lawyer to use in drawing up your Will. Your lawyer should help you determine which may be right for you.

Regardless of the specific wording used, it is important that the proper legal name of the entity be used. You may obtain the proper

name of your parish from its office or from the Diocese if you wish to make a bequest directly to your own parish. To leave a bequest to the Diocese use the name “Diocese of New Westminster”. (This term may also be used if you wish the Diocesan Office to receive and/or manage funds to benefit a parish.) If you wish to make a bequest to benefit a specific program affiliated with the Diocese (e.g. Camp Artaban, Mission to Seafarer’s, Vancouver School of Theology, etc.), please contact the Diocesan Planned Giving/Stewardship Office or the Business Administrator for the proper legal name.

You may make a bequest in one of several ways. Here are some examples, with the appropriate wording:

A **general bequest** is for a certain dollar amount of property, usually cash: e.g., I give to The Diocese of New Westminster the sum of \$\_\_\_ to be used for the general purposes of the Diocese at the discretion of the Diocesan Council.

A **specific bequest** directs that the Church is to receive a specific piece of property: e.g., I give 500 shares of XYZ stock to The Anglican Initiatives Fund of the Diocese of New Westminster.

A **residual bequest** designates all or part of what remains after debts, taxes, expenses and other bequests have been paid: e.g., I give 50 per cent of the rest, residue and remainder of my estate to The Mission to Seafarer’s Society.

A **contingent bequest** takes effect only under certain conditions: e.g., In the event that my spouse does not survive me, I give to The General Synod of The Anglican Church of Canada the sum of \$\_\_\_.

Not only can you choose how to make a bequest, you can also choose one or more purposes for which it will be used. While most bequests to The Anglican Church of Canada are for its general purposes (as in the first example), you may also make a restricted bequest for a particular program or ministry.

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.

A Power To Vary clause is 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.

## **Representation Agreements & Enduring Power of Attorney**

A Representation Agreement is a legal document that says who you give authority to in case you need help. It is your legal plan.

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.



You need to be concerned about two areas: (1) Financial and Legal Matters, and (2) Health and Personal Care. It is possible to cover all areas in one Representation Agreement, however if you own real estate, then you will use the Enduring Power of Attorney 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.

The Representation Agreement is BC's "living will" legislation. 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.

When you make an agreement and register it with the Nidus eRegistry™, your documents detailing your instructions will be available for health professionals and those you authorize to manage your affairs if it becomes necessary.

For detailed information about these agreements we recommend that you contact the Representation Agreement Resource Centre at 411 Dunsmuir Street in Vancouver. Their website is [www.rarc.ca](http://www.rarc.ca) and it carries a series of very helpful documents to help you understand these agreements and begin the process of preparing them. You can also reach them at (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](http://www.transplant.bc.ca) or call them at (604) 877-2240 or toll free at 1-800-663-6189.

## Loving Letter

A Will is a legal document that 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.



## 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 by:

### A Will

Providing for family, the church and other loved ones through a bequest in one’s Last

Will and Testament. For more information ask for our helpful *Wills & Bequest 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, and it is fully guaranteed. It

will continue as long as you live, no matter what happens to the economy or to interest rates. 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 planning 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 only pay tax on 25% of the gain derived from gifting the securities. It is the most tax-effective way to make a donation. For more information, ask for our helpful *Annuities, Trusts, Securities Brochure*.

## Retirement Plan Gifts

It is now possible to 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 can benefit you and the church. Call the Director of Gift Planning for more information.

## Legacy Funds

The Diocese has created a donor-advised fund program. Now you can create a family endowment that is permanently endowed 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 Gift Planning for complete details.

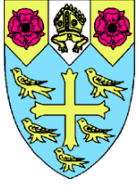
## LEGACY CIRCLE

Your thoughtful plans and stewardship mean a great deal to the Anglican Church of Canada. When you use the suggested wording (or other wording recommended by your lawyer) to make a bequest to any congregation or program of the Anglican Church of Canada, you become eligible for the Legacy Circle.

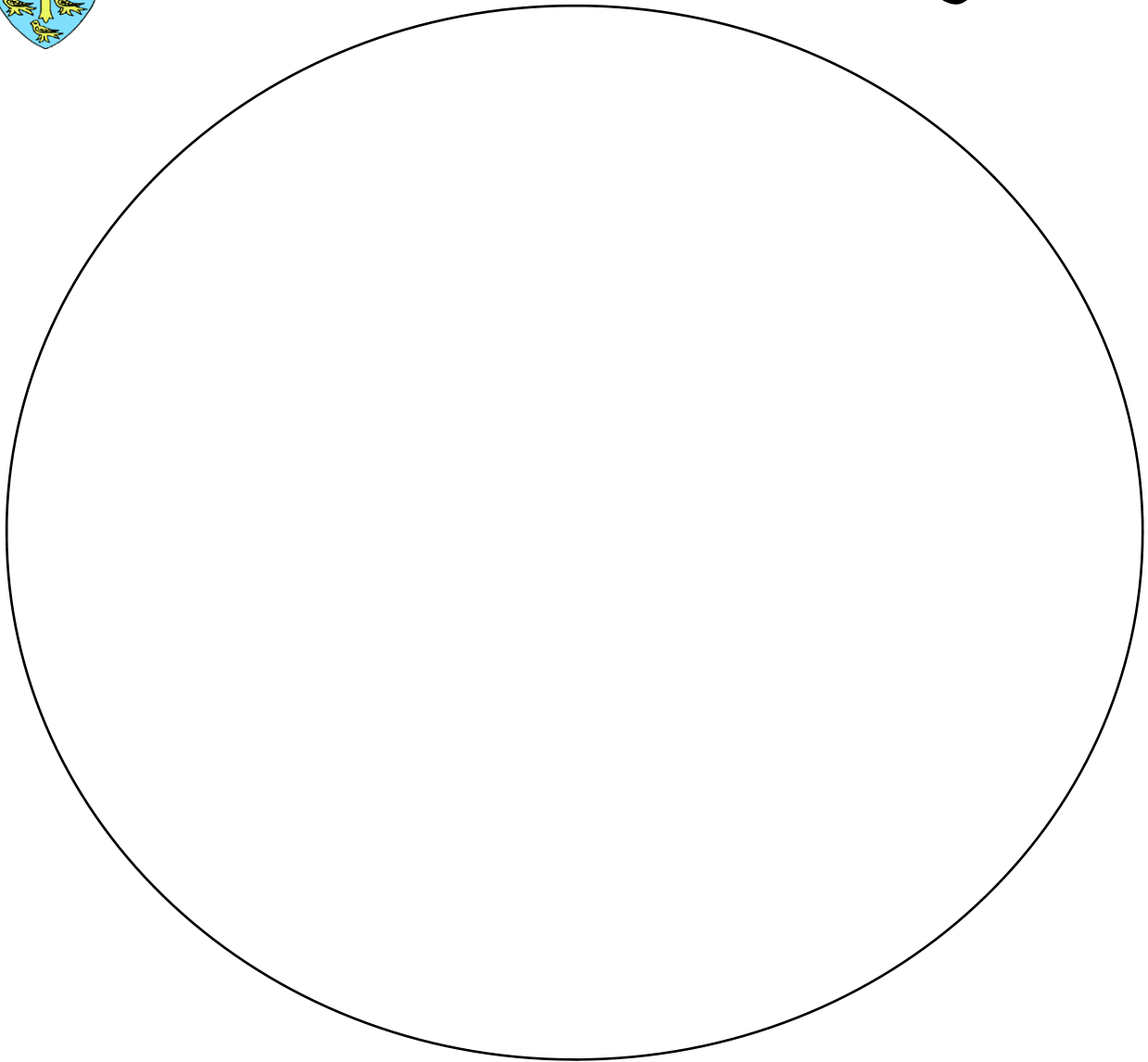
You'll be invited to an annual celebration to say thank you. Some parishes are forming their own "legacy/recognition" chapters to spread the word. Please notify the Director of Gift Planned Giving so that we may express our appreciation for your generosity and recognize you in the Legacy Circle.

Please use the form found on page 26 to join Legacy Circle or to request more information about gift planning options that may work best for your situation. For more information ask for our helpful *Legacy Circle Brochure*.

## EXERCISE:



# ***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 per cent. 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	\$	
	\$	
<b>Total</b>	\$	

### Projected Income

		<b>Continues to Spouse</b>		
		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)	\$			
<b>Total</b>	\$			

## **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 liturgy for the dead is an Easter liturgy. It finds all its meaning in the resurrection. Because Jesus was raised from the dead, we too, shall be raised.*

*The Liturgy, therefore, is characterized by joy, in the certainty that ‘neither death, nor life, nor angels, nor principalities, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in creation, will be able to separate us from the love of God in Christ Jesus our Lord.’*

*This joy, however, does not make human grief unchristian. The very love we have for each other in Christ brings deep sorrow when we are parted by death. Jesus himself wept at the grave of his friend. So, while we rejoice that one we love has entered into the nearer presence of our Lord, we sorrow in sympathy with those who mourn.”*

*The Book of Common Prayer, Episcopal Church*

(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.)

*“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, Page 568*

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

\_\_\_\_\_ Church

Address \_\_\_\_\_ City/Postal Code \_\_\_\_\_

My first choice of Celebrant: \_\_\_\_\_

My second choice of Celebrant: \_\_\_\_\_

The service shall be “The Funeral Liturgy” from:

*The Book of Alternative Services:*  Form I or  Form II or

*The Book of Common Prayer:* The Order for the Burial of the Dead, and

I request the Funeral Liturgy only to be read, or

I request the Funeral Liturgy and Celebration of Eucharist be done

I request a Graveside Service:  YES  NO

**Suggested pallbearers:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

If possible, I would like to have the following Psalms and Lessons. For suggestions, see *The Book of Alternative Services, pages 604-605.*

\_\_\_\_\_

\_\_\_\_\_

I would especially like the following hymns (include name, number, tune, source book):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**Memorials**

(Policy regarding acceptance of flowers within the 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.)

(If you so desire, please indicate where you would like to have such contributions made:)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**Burial Information**

I prefer to be: 1.  Buried ( Ground  Crypt) or  Cremated 2.  Before or  after the funeral.

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: \_\_\_\_\_

CASKET specifications:  Least expensive  Mid-range  Elaborate  Rental Only

URN specifications: \_\_\_\_\_

VIEWING:

I  do /  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:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature

Date

# Information For My Family and Friends

Final Directions and instructions upon the death of:

\_\_\_\_\_

Name

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.)

Name (Complete) \_\_\_\_\_

Address: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Baptism Date: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's Address: \_\_\_\_\_

Spouse's Birth Date: \_\_\_\_\_ Spouse's Place of Birth: \_\_\_\_\_

Spouse's Baptism Date: \_\_\_\_\_

Church Affiliation: \_\_\_\_\_

Name and Address of Home 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. \_\_\_\_\_
5. \_\_\_\_\_

Other Dependents:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

(We also recommend keeping an up-to-date address and telephone book. This can be a big help in notifying others in times of emergency.)

Location of Book \_\_\_\_\_

Names, addresses, and phone numbers of other persons to notify upon my death:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

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

Family temporarily: \_\_\_\_\_ Phone: \_\_\_\_\_

Pets temporarily: \_\_\_\_\_ 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):

1. \_\_\_\_\_
2. \_\_\_\_\_

Last Will Executed on: \_\_\_\_\_

Will is located at \_\_\_\_\_

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

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Enduring Power of Attorney holder's name and address:

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**

Description & Location (Original Cost) Market Value Mortgage

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Notes & Mortgages**

Description Name of Debtor Amount Interest Rate Rate of Payment

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

**Leases**

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Other Assets**

Description & Location (Original Cost) Market Value Mortgage

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**Key Advisors (Names/Address or Phone)**

Priest/Pastor: \_\_\_\_\_

Lawyer: \_\_\_\_\_

Accountant: \_\_\_\_\_

Investment Counselor: \_\_\_\_\_

Estate/Financial Planner: \_\_\_\_\_

Trust Company/Officer: \_\_\_\_\_

Insurance Agent: \_\_\_\_\_

<i>Life Insurance Co.</i>	<i>Amount</i>	<i>Certificate #</i>	<i>Beneficiary</i>
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1.	_____	_____	_____
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2.	_____	_____	_____
----	-------	-------	-------

3.	_____	_____	_____
----	-------	-------	-------

4.	_____	_____	_____
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RSPs, RRIFs, Pensions:

<i>Company</i>	<i>Account Number</i>	<i>Beneficiary</i>
----------------	-----------------------	--------------------

1.	_____	_____
----	-------	-------

2.	_____	_____
----	-------	-------

3.	_____	_____
----	-------	-------

4.	_____	_____
----	-------	-------

Credit and charge accounts:

<i>Company</i>	<i>Account Number</i>
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_____	_____
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_____	_____
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_____	_____
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_____	_____
-------	-------

_____	_____
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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?*

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Regarding disposition of personal effects (clothes, jewelry, paintings, etc.) unless otherwise specified in 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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Since the survivor will be faced with many problems, 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**

- |  |  |
|--|--|
| _____ Marriage License                                 | _____ Legal proof of age/birth certificate |
| _____ Citizenship papers/passport                      | _____ Survivor's Pension Information       |
| _____ Bill of sale for car/title, reg.                 | _____ Stocks                               |
| _____ Bank books /Interac Card(s)                      | _____ Will                                 |
| _____ Deeds to property                                | _____ Insurance Policies                   |
| _____ Income tax returns,<br>receipts/canceled cheques | _____ Representation Agreement             |
| _____ Power of Attorney                                | _____ Military Discharge Papers            |
| _____ Automobile Information                           | _____ Other _____                          |

MISCELLANEOUS THOUGHTS, NOTES, REFLECTIONS, OR INSTRUCTIONS

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## Liturgical Resources

### PRAYERS FROM THE BOOK OF ALTERNATIVE SERVICES

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

## Planned Giving Resources

*You Can't Take it With you: The Common Sense Guide to Estate Planning for Canadians*  
by Sandra E. Foster, 4th Edition, John Wiley & Sons, 2002, ISBN: 0-470-83156-1

*Estate Planning Workbook, A Companion to "You Can't Take it With You"*  
by Sandra E. Foster, John Wiley & Sons, 2002, ISBN: 0-470-83177-4

*The Canadian Guide to Will & Estate Planning, 2nd Edition*  
by Douglas Gray & John Budd, McGraw-Hill Ryerson, 2002, ISBN: 0-07-0894396

### Planned Giving Office Brochures & Publications

*Wills & Bequests Brochure*

*Life Insurance Gifts*

*Annuities, Trusts, Securities Brochure*

*Legacy Fund Endowment Brochure (Donor-Advised Funds)*

*Residual Interest Gifts Brochure*

*Legacy Circle Brochure*

*Legacy Planner*

### Planned Giving Office

*Director of Gift Planning*

*Diocese of New Westminster*

*580 – 401 W. Georgia Street*

*Vancouver, BC V6B 5A1*

*Phone: (604) 684-6306 Ext. 218 or 222; Facsimile: (604) 684-7017*

*Email: [plannedgiving@vancouver.anglican.ca](mailto:plannedgiving@vancouver.anglican.ca)*

### Online Resources

*Representation Agreement Resource Centre: [www.rarc.ca](http://www.rarc.ca)*

*BC Seniors Online Website: [www.mcaaws.gov.bc.ca/seniors](http://www.mcaaws.gov.bc.ca/seniors)*

*Public Legal Education Society: [www.publiclegaled.bc.ca](http://www.publiclegaled.bc.ca)*

*Electronic Law Library: [www.bcpl.gov..bccca/ell](http://www.bcpl.gov..bccca/ell)*

*Public Guardian & Trustee: [www.trustee.bc.ca](http://www.trustee.bc.ca)*

*BC Transplant Society: [www.transplant.bc.ca](http://www.transplant.bc.ca)*

# Legacy Circle Registration

*The Legacy Circle is open to anyone who has named any Anglican Church of Canada, ministry or program in their estate plan. The circle is one of the major ways we spread the ministry of planned giving to other church members. Please join us by simply completing the form below and return it to the Planned Giving Office. An annual celebration is held for Circle members to be thanked by the Bishop and to welcome new members.*

I believe I qualify to become a member of the Legacy Circle. I have already remembered in my Will or other estate plans:

- the parish listed here: \_\_\_\_\_
- the Diocese of New Westminster
- a program or ministry of this Diocese or the Anglican Church of Canada elsewhere:  
\_\_\_\_\_
- I wish to remain anonymous.

**Request for information:**

Please send me more information on:

- Wills
- Helping the Church through Life Insurance
- Gifts to the Church that pay me income, i.e. Charitable Gift Annuities, Charitable Remainder Trusts
- Gifts of Appreciated Securities, Real Estate, RSPs, RRIFs
- I would like a representative of the Church familiar with estate planning to contact me about exploring the best ways for me to give

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Phone (work): \_\_\_\_\_ (home): \_\_\_\_\_

Email address: \_\_\_\_\_

Parish: \_\_\_\_\_

*Return this form to:*

**DIRECTOR OF GIFT PLANNING**

**DIOCESE OF NEW WESTMINSTER**

580 – 401 West Georgia Street, Vancouver, BC V6B 5A1

PHONE: (604) 684-6306 x 218; FAX: (604) 684-7017

EMAIL: [plannedgiving@vancouver.anglican.ca](mailto:plannedgiving@vancouver.anglican.ca)





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

Hebrews 13:16

**Director of Gift Planning  
Diocese of New Westminster  
Anglican Church of Canada  
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Website: [www.vancouver.anglican.ca](http://www.vancouver.anglican.ca)**