

Future Planning: Are You Ready?

Plan early to have a voice in your future. This checklist will assist you and your family as you prepare for important health, personal, financial and legal decisions.

Health and Personal Affairs	Information Resources	Yes	No
Complete a health care directive and advance care plan. Communicate the plan with your proxy(s) and Power of Attorney.	<ul style="list-style-type: none"> • Physician • Home Care Case Coordinator • Senior Resource Council (request an Emergency Resource Information Kit) • Manitoba Health www.gov.mb.ca/health/livingwill.html 	<input type="checkbox"/>	<input type="checkbox"/>
Discuss with your physician and family whether it is safe to continue driving. Consider available options for transportation.	<ul style="list-style-type: none"> • Physician • Manitoba Public Insurance Phone: 1-800-665-2410 www.mpi.mb.ca 	<input type="checkbox"/>	<input type="checkbox"/>
Label your keys, make duplicates and place one set of keys in a location that is known to a trusted family member(s) and your Power of Attorney.	<ul style="list-style-type: none"> • Locksmith 	<input type="checkbox"/>	<input type="checkbox"/>
Review and update personal status information. Prepare a list of: <ul style="list-style-type: none"> • Identification numbers for birth certificate, personal health information, driver license, Social Insurance, Veteran's Affairs Canada • Medical conditions • Known allergies • Medications (prescription and non-prescription) • Physician name • Emergency contact people and their phone numbers 	<ul style="list-style-type: none"> • Manitoba Health Phone: 204-786-7101 or 1-800-392-1207 Deaf Access line: TTY/TDD: 204-774-8618 Residents outside Winnipeg: Deaf Access Line: TTY/TDD call relay 711 or 1-800-432-4444 www.gov.mb.ca/health/health/ Insured Benefits Branch insuredben@gov.mb.ca • Veteran's Affairs Canada Phone: 1-866-522-2122 (English) 1-866-522-2022 (French) www.veterans.gc.ca/enginformation@vac-acc.gc.ca • Manitoba Vital Statistics Phone: 204-945-3701 or 1-866-949-9296 vitalstats@gov.mb.ca • Manitoba Institute of Patient Safety Phone: 204-927-6477 www.safetoask.ca 	<input type="checkbox"/>	<input type="checkbox"/>

*The content of this handout is for information only and is **NOT** intended to provide legal advice. Consult your lawyer, accountant or financial advisor concerning your financial, legal and health care planning needs.*

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WESTMAN - BRANDON
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Financial and Legal Affairs	Information Resources	Yes	No
<p>Make and register an Enduring Power of Attorney. Review and update content as needed.</p>	<ul style="list-style-type: none"> • Lawyer • Public Trustee of Manitoba Phone: 204-945-2700 or 1-800-282-8069 ext 2700 www.gov.mb.ca/publictrustee/pdf/power_of_attorney_guide_book.pdf • Community Legal Education Association Phone: 204-943-2382 or 1-800-262-8800 www.communitylegal.mb.ca/ • A Legal Information Guide for Seniors www.gov.mb.ca/shas/publications/guide_for_seniors.pdf 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Make and register a will. Review and update content as needed.</p>	<ul style="list-style-type: none"> • Lawyer • Community Legal Education Association Phone: 204-943-2382 or 1-800-262-8800 www.communitylegal.mb.ca/ • A Legal Information Guide for Seniors www.gov.mb.ca/shas/publications/guide_for_seniors.pdf 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Review and update your insurance policies and the beneficiaries.</p>	<ul style="list-style-type: none"> • Insurance agent • Financial advisor 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Review personal banking, credit cards and any existing line of credit.</p> <p>Review and update beneficiaries of existing accounts and registered retirement saving plan (RRSPs) or registered retirement income fund (RRIFs).</p>	<ul style="list-style-type: none"> • Bank or Credit Union • Financial advisor • Accountant 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Prepare a financial plan to include:</p> <ul style="list-style-type: none"> • Future living costs • Funeral costs <p>Discuss with your family how they can support you when current living arrangements are no longer safe. Visit prospective housing options with your family.</p>	<ul style="list-style-type: none"> • Bank or Credit Union • Financial advisor • Accountant • Housing Options for Older Manitobans http://www.gov.mb.ca/health/aginginplace/docs/aip.pdf • Long Term and Continuing Care Association of Manitoba www.ltcam.mb.ca/options_supportive_aboutus.htm 	<input type="checkbox"/>	<input type="checkbox"/>
<p>Ensure that income tax files are current.</p> <p>Complete the Canada Revenue Agency form Authorizing or Cancelling a Representative (T1013).</p> <p>Apply for tax credits:</p> <ul style="list-style-type: none"> • Disability Tax Credit (T2201) • Manitoba Primary Caregiver Tax Credit 	<ul style="list-style-type: none"> • Accountant • Canada Revenue Agency Phone: 1-800-959-5525 or 1-800-959-8281 www.cra-arc.gc.ca www.cra-arc.gc.ca/E/pbg/tf/t1013-README.html • Disability Tax Credit Phone: 204-984-5164 or 1-800-959-8281 www.cra-arc.gc.ca/E/pbg/tf/t2201 • Manitoba Primary Caregiver Tax Credit Phone: 204-788-6646 or 1-866-626-4862 http://www.gov.mb.ca/finance/tao/caregiver.html 	<input type="checkbox"/>	<input type="checkbox"/>

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