

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.

Revised January 2024

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.

Legal & Financial Affairs

Information Resources

Y/N

<p>Complete a health care directive and advance care plan.</p> <p>Communicate the plan with your designated health care proxy.</p>	<ul style="list-style-type: none"> • Physician • Lawyer • Health Care Proxy • Home Care Case Coordinator • Senior Resource Council (Request an Emergency Resource Information Kit (E.R.I.K)) • Manitoba Health – Health Care Directive • Health Care Directive Form - PDF - Government of Manitoba • Community Legal Education Association 204-943-2382 	<input type="checkbox"/>
<p>Make and register an Enduring Power of Attorney.</p> <p>Review and update content as needed.</p>	<ul style="list-style-type: none"> • Lawyer • Public Guardian & Trustee of Manitoba • Public Guardian & Trustee of Manitoba - Powers of Attorney • Manitoba Government Inquiry 204-945-3744, 1-866-626-4862, mgi@gov.mb.ca • Community Legal Education Association 204-943-2382 • A Legal Information Guide for Seniors - PDF - Government of Manitoba • Law Phone-In and Lawyer Referral Program - Community Legal Education Association 	<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"/>

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INTERLAKE / EASTERN | TEL: 204-268-4752
EMAIL: alzne@alzheimer.mb.ca

NORTH CENTRAL | TEL: 204-239-4898
EMAIL: alznc@alzheimer.mb.ca

PARKLAND | TEL: 204-638-4483
EMAIL: alzprk@alzheimer.mb.ca

SOUTH CENTRAL | TEL: 204-325-5634
EMAIL: alzsc@alzheimer.mb.ca

SOUTH EASTMAN | TEL: 204-326-5771
EMAIL: alzse@alzheimer.mb.ca

WESTMAN | TEL: 204-729-8320
EMAIL: alzwm@alzheimer.mb.ca

Legal & Financial Affairs

Information Resources

Y/N

<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> <p>Review all accounts held at varying financial institutions.</p> <p>Review who your lawyer, accountant, investment advisor, etc. are.</p>	<ul style="list-style-type: none"> • Bank or Credit Union • Financial advisor • Accountant • Power of Attorney • What to Include in Your Financial Checklist - TD Bank • TD Financial Checklist - PDF - TD Bank
<p>Make and register a will.</p> <p>Review and update content as needed.</p>	<ul style="list-style-type: none"> • Lawyer • Manitoba Government Inquiry mgi@gov.mb.ca, 204-945-3744 or 1-866-626-4862 • Community Legal Education Association 204-943-2382 • A Legal Information Guide for Seniors - PDF - Government of Manitoba • Law Phone-In and Lawyer Referral Program - Community Legal Education Association
<p>Ensure that income tax files are current.</p> <p>Apply for tax credits:</p> <ul style="list-style-type: none"> • Disability Tax Credit (T2201) • Home Accessibility Tax Credit • Canada Caregiver Credit • Manitoba Primary Caregiver Tax Credit • Multigenerational Home Renovation Tax Credit 	<ul style="list-style-type: none"> • Accountant • Canada Revenue Agency (CRA) 1-800-959-8281 • Canada Revenue Agency (CRA) - Represent a Client • Canada Revenue Agency (CRA) - Information about Represent a Client • Canada Revenue Agency (CRA) - Represent a Client: What's New • Disability Tax Credit • Canada Caregiver Credit • Home Accessibility Tax Credit • Manitoba Tax Assistance Office - Manitoba Primary Caregiver Tax Credit 204-948-2115 or 1-800-782-0771, TAO@gov.mb.ca • Multigenerational Home Renovation Tax Credit

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Health

Information Resources

Y/N

<p>Emergency Response Information Kit (E.R.I.K.)</p> <p>The Emergency Response Information Kit (E.R.I.K.) provides important medical information about you should first responders arrive at your home during an emergency.</p>	<ul style="list-style-type: none"> • The E.R.I.K is available from your local Senior Resource Council. Call 1-800-665-6565 to find out the phone number of the Senior Resource Council nearest you. • Shared Health E.R.I.K. • City of Winnipeg E.R.I.K. 	<input type="checkbox"/>
<p>Advance Care Planning (ACP)</p> <p>As dementia progresses, it can become difficult to make choices about care, finances and other important decisions. However, there are a number of things you can do now to ensure your wishes are communicated, heard and respected.</p>	<ul style="list-style-type: none"> • Planning For Your Future Alzheimer Society of Canada • Individuals & Families Advanced Care Planning Canada 	<input type="checkbox"/>
<p>Manitoba Home Care Program</p> <p>For more information, or to request Home Care services, please contact your local Regional Health Authority (RHA).</p>	<ul style="list-style-type: none"> • Winnipeg Regional Health Authority 204-788-8330 • Interlake-Eastern Regional Health Authority 1-855-347-8500 • Northern Regional Health Authority 204-687-4870 • Prairie Mountain Health 204-483-5000, 1-888-682-2253 • Southern Health-Santé Sud 204-482-2720, 1-800-742-6509 • Community Resources - PDF - Alzheimer Society of Manitoba 	<input type="checkbox"/>
<p>Discuss with your physician and family whether it is safe to continue driving.</p> <p>Consider available options for transportation.</p>	<ul style="list-style-type: none"> • Physician • Manitoba Public Insurance (MPI) 1-800-665-2410 • MPI - Medical Assessments and Driving - DriveABLE • MPI - Concerned about Someone's Driving? • Driving & Dementia Roadmap • Conversations about Dementia and Driving - PDF - Alzheimer Society of Canada 	<input type="checkbox"/>

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<p>All About Me - Person-Centered Care</p> <p>Complete with your family and health care proxy an 'All About Me' booklet, to assist future carers provide you with effective care and get to know you.</p>	<ul style="list-style-type: none"> • All About Me - PDF - Alzheimer Society of Canada • All About Me: A Conversation Starter - PDF - Alzheimer Society of Canada 	<input type="checkbox"/>
<p>Housing/Living Arrangements</p> <p>Discuss with your health care proxy and power of attorney your wishes for future care needs, including preferences in housing transitions.</p> <p>Discuss and prepare a financial plan to include:</p> <ul style="list-style-type: none"> • Future living costs • Funeral costs • Other health/medical expenses <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"> • Housing Directory - Winnipeg Housing Directory for Older Adults (A & O: Support Services for Older Adults) • Personal Care Services: A Guide to Services and Charges in Manitoba - PDF - Government of MB • Residential Charge Calculator - Government of MB • Housing Options for Older Manitobans - Government of MB • Personal Care Homes in Manitoba - Government of MB • Long-Term Care Access Centre - WRHA • Long Term and Continuing Care Association of Manitoba • Manitoba Association of Residential & Community Care Homes for the Elderly (MARCHE) 	<input type="checkbox"/>
<p>Hospital Readiness - Be Ready for an Emergency Department Visit Check</p> <p>Whether it is a planned admission or an unexpected emergency visit, preparation can help to improve the experience.</p>	<ul style="list-style-type: none"> • 'Be Ready for an Emergency Department Visit' - PDF - Alzheimer Society of Canada <p>'Be Ready for an Emergency Department Visit' is a series of handy checklists and forms to fill out before a trip to the hospital is necessary, so that you can be ready to go.</p>	<input type="checkbox"/>

General

Information Resources

Y/N

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"/>
<p>Review and update personal status information. Prepare a list of:</p> <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 204-786-7101, 1-800-392-1207 Deaf Access line: TTY/TDD: 204-774-8618 Residents outside Winnipeg: Deaf Access Line: TTY/TDD call relay 711 or 1-800-855-0511 • Insured Benefits Branch insuredben@gov.mb.ca • Veteran's Affairs Canada 1-866-522-2122 (English) 1-866-522-2022 (French) information@vacc-acc.gc.ca • Manitoba Vital Statistics 204-945-3701 or 1-866-949-9296 vitalstats@gov.mb.ca • Online Certificate Application Manitoba Vital Statistics Branch Province of Manitoba • Manitoba Institute of Patient Safety 204-927-6477 • It's Safe to Ask Shared Health • Patient Safety Shared Health 	<input type="checkbox"/>
<p>Planning for caregiver absence</p> <p>Illness? Respite? Surgery?</p> <p>There may be a time that someone else may suddenly need to help care of you. If and when this happens, it's helpful to have a plan documented, that you keep up to date.</p>	<ul style="list-style-type: none"> • 'Ready, Set, Plan - For Care Partner Absence' Toolkit Alzheimer Society of Ontario 	<input type="checkbox"/>

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