



## Four Critical Life and Death Documents Every Adult in Alberta Needs

### 1. Personal Directive

- **Purpose:** A legal document that allows you to name someone to make personal decisions on your behalf if you become unable to do so due to illness or injury.
- **Key Decisions Covered:** Health care, accommodation, personal services, and other non-financial matters.
- **Why It's Important:** Ensures your personal care preferences are honoured and relieves your loved ones from making difficult decisions without guidance.

### 2. Enduring Power of Attorney

- **Purpose:** A legal document that designates someone to make financial and legal decisions on your behalf if you lose the mental capacity to do so.
- **Key Decisions Covered:** Managing your finances, paying bills, selling property, and handling investments.
- **Why It's Important:** Protects your financial interests and ensures continuity in managing your affairs, avoiding the need for court intervention.

### 3. Financial Plans (Including Will and Estate Plans)

- **Purpose:** Comprehensive plans that outline how your assets, property, and financial affairs will be managed and distributed, including the creation of a will.
- **Key Components:** Naming an executor, guardianship of minor children, asset distribution, and minimizing tax implications.
- **Why It's Important:** Ensures your wishes are followed, helps avoid family disputes, and can reduce the legal burden on your loved ones.

### 4. Funeral and Burial Plans

- **Purpose:** Detailed instructions regarding your preferences for funeral and burial arrangements, including any pre-planning or pre-payment arrangements.
- **Key Components:** Choice of burial or cremation, type of service, specific wishes for the ceremony, and any prearranged agreements with funeral service providers.
- **Why It's Important:** Relieves your family from making difficult decisions during a time of grief and ensures that your final wishes are respected. Prepayment

## Why These Documents Matter

- **Peace of Mind:** Having these documents in place ensures your wishes are clearly outlined and followed. Additionally, by pre-purchasing plans, you can save money and spare your loved ones from unnecessary grief and financial burden.
- **Avoiding Family Conflict:** Clear, legally binding instructions can prevent disagreements and stress among family members.
- **Legal Protection:** These documents ensure that your personal, financial, and health decisions are respected and legally protected.

## Steps to Get Started

1. **Consult a Legal Professional:** Seek advice from a lawyer or legal advisor experienced in estate planning.
2. **Communicate Your Wishes:** Discuss your plans with family members, your designated representatives, and your healthcare providers.
3. **Store Documents Safely:** Keep these documents in a secure place where your executor and representatives can easily access them.

## Resources

- **Alberta Government Website:** Provides forms and information on creating Personal Directives, Enduring Power of Attorney, and Wills. (<https://www.alberta.ca/decision-making-advance-planning>)
- **Green Sleeve (Alberta Health Services):** Learn more about advance care planning and how to document your healthcare wishes. (<https://myhealth.alberta.ca/advance-care-planning/keep-advance-care-planning-documents-in-a-green-sleeve>)
- **Cooperative Memorial Society:** Offers support and resources for pre-planning and documenting your final wishes, including an online registry, savings on funeral and burial plans.

## Contact Information

- **For more information:** Visit the Cooperative Memorial Society at <https://www.coopmemorial.org/> or contact us at [admin@coopmemorial.org](mailto:admin@coopmemorial.org) or 403-248-2044 / 1-800-566-9959

