



Planning Checklist for Alberta Seniors

1. Legal & Decision-Making Documents

- Up-to-date Will
- Executor and alternate named
- Enduring Power of Attorney (Alberta-compliant)
- Personal Directive (Healthcare Directive)
- Key people know where originals are stored

2. Financial Clarity

- List of bank accounts and investments
- Beneficiaries reviewed and updated
- Life insurance policies documented
- Debts and monthly obligations identified
- Financial advisor / accountant contact recorded

3. Healthcare & Personal Wishes

- End-of-life preferences discussed
- Long-term care preferences considered
- Organ donation decision recorded
- Medication list maintained

4. Digital & Practical Planning

- Secure record of important passwords
- Digital accounts identified
- Funeral preferences documented
- Location of important documents recorded

5. Family Communication

- Executor and attorneys informed
- Adult children aware of overall plan
- Blended family considerations addressed
- Values and intentions communicated

6. Review & Update

- Documents reviewed within last 3–5 years
- Updated after major life events

Planning is not about expecting something bad to happen. It is about ensuring your voice is respected, your family is protected, and your values are honoured.

To speak with our team directly, book a meeting at our office, email us at dgee@paramountlaw.group or call (403) 263-8884.