

Steps to follow	COMPLETED Y/N	FOLLOW- UP DATE
<p><b>1. Plan for the distribution of your estate.</b> By effectively planning the distribution of your estate now, you can ensure that your wishes will be respected after death.</p>		
<p><b>2. Review your current situation.</b> What is your situation with respect to your family, your work and your finances?</p>		
<p><b>3. Review the elements of your estate.</b> By knowing what you have, you will ensure that you will not forget anything.</p>		
<p><b>4. Gather your relevant documents.</b> This will allow you to have all relevant documents ready when you need them.</p>		
<p><b>5. Think about what you wish to happen after your death.</b> How will you distribute your estate? Do you wish to donate to charitable organisations that are near and dear to your heart?</p>		
<p><b>6. Do you have any particular concerns regarding your estate distribution?</b> Do you have minor children, or a handicapped dependant? A blended family?</p>		
<p><b>7. Speak about your goals and wishes to your family.</b> It is critical that your family understands your wishes after death to ensure that they carry them out. A family meeting is an ideal opportunity to discuss this.</p>		
<p><b>8. Write up and update your will.</b> Regardless of the type of will, it is the ideal tool to communicate your wishes.</p>		

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<p><b>9. Foresee the means that will allow you to reduce the costs associated with your death.</b></p> <p>You certainly don't want to leave debts for your heirs! Plan now to see how to reduce these costs.</p>		
<p><b>10. Make sure that you have a power of attorney or protection mandate in case of incapacity*.</b></p> <p>No-one is safe from future incapacity. This is why it is important to take the steps that will authorize someone to make important decisions for you if you should become incapacitated.</p>		
<p><b>11. Ensure the management of your property by creating a trust (inter vivos or testamentary).</b></p> <p>There are several advantages to creating a trust, but they are not appropriate for everyone. Evaluate if this is an interesting option for you.</p>		
<p><b>12. Plan donations.</b></p> <p>Do you have a charitable organisation that is near and dear to your heart? Ensure that your donations match your wishes.</p>		
<p><b>13. Insuring your life may be useful.</b></p> <p>There are several good reasons for taking out a life insurance policy. Explore the advantages from which you could benefit right away!</p>		
<p><b>14. Ensure that your business has a succession plan.</b></p> <p>As a business owner, you have worked hard to build your business, and therefore want to ensure that it will outlive you! Ensure that it will be in good hands when you are no longer there to take care of it.</p>		

\*Depends on the province



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