



Plan Ahead Toolkit

A toolkit for organizations to
support their communities to
plan ahead.

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Acknowledgements

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This toolkit is intended to provide general information only. Every effort has been made to ensure the accuracy of the information contained within. The contents do not constitute medical or legal advice and should not be relied upon as such. It is recommended that individuals seek the advice of professionals in the relevant fields for personalized guidance on their specific circumstances.



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About This Toolkit

Who is this toolkit for?

This toolkit was developed to equip community leaders, groups and organizations with the information needed to support public education initiatives on health and personal, financial and estate planning.

Examples of who might find this toolkit useful:

- Community organizations (e.g., libraries, family services, seniors support)
- Faith and cultural communities
- University and school staff
- Workplaces
- Private businesses

What is in this resource?

This toolkit contains:

- Alberta-specific information on health, financial and estate planning.
- tips for facilitators to support public education initiatives on these topics.
- resources to support public awareness and further education.

Please note that this toolkit is not an exhaustive resource on planning ahead for all situations. It is intended to introduce the essential planning documents in Alberta.

How to use this guide?

1. Determine which topic in the toolkit you'd like to create an initiative on.
2. Determine which format best suits the purpose and audience of this session (e.g., workshop, conversation circle, book club).
3. Use the content in the toolkit to develop your slides, notes, program, activities, etc.
4. Use the "Tips for Facilitators" section under each topic to support organization of your initiative.
5. Run your initiative!

Thank you for helping Albertans plan ahead!



General Tips for Facilitators



Watch for the light bulb icon throughout the toolkit to get tips on how to support public education on these topics. The tips below can be applied broadly to any initiatives you may be planning.

Identify your target audience.

This will help you tailor your message to meet the needs of the group. Consider age, health status, cultural background, gender, location and other aspects of the people who will attend your event.

Find a format that best suits your needs.

Supporting your community members in planning ahead can be done through different formats such as: presentations, webinars, workshops, conversation cafes, book clubs, games and podcasts.

Develop informative material for your initiatives.

Use the information in this toolkit to create your own material such as booklets, flyers, checklists, presentations, brochures, fact sheets, videos, worksheets and guides as is relevant to your community (e.g., translating, adapting to different cultural contexts).

Use plain language.

Plain language is inclusive because it does not require prior knowledge or expert language skills and helps to ensure that everyone can understand the message.

Leverage the power of stories.

Storytelling can help to engage, motivate and inspire people by creating a memorable and relatable experience that illustrates the importance of planning ahead.

Partner with local healthcare providers, lawyers, financial planners, social workers, community organizations and other professionals.

These individuals and groups can provide expertise, credibility, accessibility, connections and resources to support planning ahead in the community.

Educate older adults on elder abuse.

Include elder abuse prevention information in your sessions with older adults (see pg. 21).

CompassionateAlberta.ca has resources to support you.

Find conversation starters, games, workbooks, quizzes, checklists and more to support you in creating and implementing planning ahead initiatives in your community.

Evaluate your sessions.

Use the evaluation survey in this toolkit with your attendees to understand how effective your initiative was and how it can be improved.



Overview of the Key Planning Documents in Alberta

Every Albertan who is at least 18 years old should have the following legal documents prepared for their health, finances and estate: a **personal directive**, an **enduring power of attorney** and a **will**. Depending on your situation, you may also need a **Goals of Care Designation order** and **supported decision-making authorization**. The table below summarizes the basics of these documents.

Planning Document	Who Needs This?	Purpose	When is it Used?
Personal Directive	Every Albertan 18+	Outlines your health and personal care instructions and who will decisions for you if you are unable.	Only when you lose capacity.
Enduring Power of Attorney	Every Albertan 18+	Outlines your financial instructions and who will make decisions for you.	(1) Immediately and continues if you lose capacity or (2) only when you lose capacity.
Goals of Care Designation	Those with serious illness and other special cases	Set of instructions that the healthcare team involved in your care must follow.	During a medical emergency.
Supported Decision-Making Authorization	A capable adult who needs help making decisions	Outlines who can access your personal information to help you make personal decisions.	You can make your own decisions but would like some help.
Will	Every Albertan 18+	Outlines how to distribute your property and possessions and who will do this for you.	After your death.

If a person does not have these documents in place, family or friends may have to apply to the court for permission to manage their personal matters, which takes time and money. This toolkit will expand on the above documents in more detail, along with other steps Albertans can take to plan for and protect what matters most to them.



Health and Personal Planning



How Jose and Mariana Have Planned Ahead

Mariana's dad, Jose, has diabetes but he is in good health and managing well. Mariana accompanies her dad to his medical appointments because he sometimes has difficulty understanding his doctor. Because the two of them filled out a **supported decision-making** authorization form, Jose has given Mariana permission to access his personal information to help him make and communicate decisions and he has discussed his **organ and tissue donation** wishes with her. Mariana has also helped Jose fill out a **personal directive** that outlines his wishes for personal and health care in the event he becomes too sick or injured to speak for himself. Jose has chosen Mariana as his **agent** in his personal directive.

It is important for all Albertans to plan for their health and personal care as Jose has done. This section will discuss advance care planning, supported decision-making and organ and tissue donation.



Advance Care Planning

What is advance care planning?

Advance care planning is how you think about, talk about and document the health and personal care you want to receive now and in the future.

Who is advance care planning for?

It is for every adult at any point in life. It is best done when you are healthy and before there is an urgent need for it.

What are the documents involved in advance care planning?

The following documents are involved in the advance care planning process. Depending on your health situation, you may or may not require all of them.

- Personal directive (pg. 7)
- Goals of Care Designation order (pg. 8)
- Tracking record (pg. 9)

Where should advance care planning documents be kept?

Your advance care planning documents should be kept in a folder called a **Green Sleeve**.

The Green Sleeve provides easy and immediate access for you, your family and your medical team to printed copies of your advance care planning documents. Don't assume your healthcare provider already knows your instructions or has access to these documents electronically.

The **Green Sleeve** should always be kept on or near your refrigerator, as that is where healthcare providers are trained to look for it in an emergency. Take it with you when you go to any medical appointments and make sure that it comes home with you.

How do you do advance care planning?

There are five steps to do advance care planning:

Think about your values and goals.

Learn about your own health.

Choose someone to make health and personal decisions for you.

Communicate your wishes to the people you trust and your healthcare team.

Document your wishes in a personal directive.

Advance care planning is *ongoing* reflection, conversation and preparation for how you want to be cared for now and in the future. It is not meant to be done in one sitting and placed out of mind. Review and update your documents as your health changes, or as your beliefs and values evolve. Continue to have conversations with the people closest to you and your



healthcare providers so that everyone is aware and updated on how you want to be cared for.

Why is it important to do advance care planning?

If you are too sick or injured to speak for yourself, advance care planning allows your care preferences to be known by the people that matter most to you and your healthcare team. Doing your advance care planning will also help you make other important decisions because you would have thought about what matters most to you.

Personal Directive

What is a personal directive?

A **personal directive** is a legal document that outlines your health and personal care instructions and who will make decisions for you (your **agent**) if you are too sick or injured to make your own decisions. It is written when you have **capacity**.

Who needs a personal directive?

Every Albertan 18 years old and older should have a personal directive.

What goes in a personal directive?

Your personal directive can be about any personal and health matters that are not financial, such as:

- medical treatments you do or do not want.
- where you want to live.
- who you would like to live with.
- who will care for your children under 18 years old.
- decisions about other personal or legal matters, including recreation, employment and education.

Your personal directive cannot include a request for a medically assisted death.

Who can I choose to be my agent?

An agent must be 18 years and older and have capacity. Choose someone you trust, understands your values, wishes and beliefs, can make highly sensitive decisions and act in your best interest. It is best to ask the person directly if they can be your agent before naming them in your personal directive.

You can name one or more people to be your agent. If you name more than one person, you can state whether they are to act separately or jointly. It is also a good idea to specify how you want them to exercise their authority, make decisions and communicate with one another.

An agent cannot act as witness to your signature on your personal directive.



How is a personal directive created?

You can complete a personal directive on your own or with a lawyer. To obtain a personal directive form and instructions, visit the Alberta government's [Office of the Public Guardian and Trustee website](#). You may wish to discuss your personal directive with your trusted healthcare provider and/or lawyer as there may be additional considerations to be aware of, depending on your situation (e.g., health status and legal matters). Your personal directive will stay in effect until you change it, cancel it or die.

Important life events such as getting married or becoming a parent may require a review and update of your personal directive, along with other important documents (e.g., will, enduring power of attorney).

Why is it important to have a personal directive?

During moments of stress and difficult decision-making, your agent will be able to direct your care and communicate what you want on your behalf. This can prevent confusion and disagreement about how your personal and healthcare matters are to be managed.

If you don't have a personal directive and doctors determine you can't make your own decisions:

- you don't get to choose who will make decisions for you.
- a healthcare provider may ask your nearest relative to make decisions for you.
- a family member or friend may have to go to court to become your guardian to make decisions for you. This takes time and money.

Goals of Care Designation Order

What is a Goals of Care Designation (GCD) order?

It is a set of instructions that your healthcare team must follow when caring for you.

Who needs a GCD order?

Not everyone will need a GCD order. It is important to have a GCD order when **full resuscitative care** (e.g., cardiopulmonary resuscitation (CPR)) is not what you want or is not appropriate for your illness. Without a GCD order, full resuscitative care is provided when your heart stops beating or you stop breathing. To find out if you need one, talk to your healthcare provider.

What is in a GCD order?

A GCD order specifies the approach of care that best aligns with your wishes, values and medical situation. There are three general approaches to care:

- **Resuscitative care:** provides all suitable intensive treatments to prolong and preserve life as long as possible.
- **Medical care:** provides all suitable care to manage or cure illnesses without using unwanted intensive treatments.



- **Comfort care:** provides as much support, care, and comfort as possible to ease symptoms from incurable illness.

How is a GCD order created?

After discussing your wishes, values and health situation with you, your doctor or nurse practitioner will recommend the best type of care for you, which they will write in your GCD order. Your personal directive can also inform this process. It is important that you speak up about what is important to you.

Your GCD order can and should change as your health changes. You can ask your healthcare provider to change your GCD order as many times as you want.

Why is a GCD order important?

It ensures that your healthcare team only provides the kind of care you have asked for and is in line with your goals, values and beliefs.

What is the difference between a GCD order and a personal directive?

Your healthcare provider writes your GCD order with you to guide medical treatment decisions. Your personal directive is a legal document that you write yourself or with a lawyer to outline your decisions for your personal and healthcare matters and who would make these decisions for you if you were unable. If you have a GCD order, it will go hand in hand with your personal directive.

Tracking Record

What is a tracking record?

It is a form your healthcare team uses to track conversations and decisions about your advance care planning and Goals of Care Designation.

Why is it important?

Your tracking record helps your healthcare team to understand when and why your current healthcare decisions were made and if they need to be updated. This saves you from repeating your medical information to every healthcare provider you visit.

Who records information in a tracking record?

Only your healthcare provider(s) record information in a tracking record. You or your family shouldn't write in this form.





Tips for Facilitators

Start with the basics of advance care planning.

- Provide information on advance care planning and the documents involved in a format that is best suited to your audience.
- Use the [advance care planning quiz](#) in this toolkit to test your attendees' knowledge.
- Allow time for questions and discussion to address any concerns or misconceptions.

Use the five steps of advance care planning in your session.

- Walk attendees through the five steps of advance care planning by completing activities related to each step.
- Provide your attendees with the [advance care planning checklist](#) in this toolkit to work on together or for them go through at their own pace.
- Provide the [plan ahead checklist](#) in this toolkit to enable attendees to see how advance care planning fits with other aspects of life planning.
- Use the [My Wishes Alberta](#) workbook to help attendees think about what matters most to them.

Invite speakers to your sessions.

- Invite healthcare, legal and other professionals to speak and answer questions on this topic.
- Invite people to share their personal stories of advance care planning.

Encourage your audience to start the advance care planning process early.

- Emphasize that it is best to do it when an individual is healthy and able to make decisions for themselves.
- Encourage reviewing and updating advance care planning documents following important life events (e.g., change in health, becoming a new parent).

Focus on the benefits of advance care planning instead of using fear-based messaging.

- Positive messages are more likely to empower people to start advance care planning.
- Fear-based messaging can make people feel like they are not in control, which may cause them to avoid this process.

Showcase or distribute Green Sleeves during your sessions.

- Discuss the advance care planning documents held in a Green Sleeve and the role of each document.



- Provide information to your audience on how to obtain a Green Sleeve.
 - Search “Green Sleeve” on [MyHealth.Alberta.ca](https://myhealth.alberta.ca) to get a free Green Sleeve mailed to anyone who needs one or ask a doctor for one.

Advance care planning can be difficult and emotional for some people.

- Provide a safe and supportive environment for your audience to share their thoughts and feelings.

Ask attendees to share what they have learned.

- Encourage attendees to share what they have learned and start conversations about advance care planning in their communities.

Provide resources and support.

- Public-facing information on this topic can be found on CompassionateAlberta.ca in the [Advance Care Planning section](#).
- Access the [Resource Directory](#) on CompassionateAlberta.ca for guides, workbooks, games and conversation starters on advance care planning.
- The Alberta government’s [Office of the Public Guardian and Trustee website](#) provides a downloadable personal directive form and instructions.
- Connect participants with local health and legal supports such as health clinics and free or for-a-charge legal services.

Supported Decision-Making

What is supported decision-making?

Supported decision-making is the process of selecting someone to help you to make personal decisions. This is done through a document called a supported decision-making authorization.

Who needs supported decision-making?

Even if you can make their own decisions, there may be times when you need help making them. Supported decision-making allows for adults who still have capacity (**supported adult**) to select up to three individuals (**supporters**) to help them make and communicate personal but not financial decisions.

This process could help a capable adult if they:

- are facing difficult decisions and would like help in the decision-making process (e.g., selecting appropriate treatments, facilities, and/or medications).
- are having difficulties communicating in English and would like help communicating decisions.



- have other communication difficulties.
- have mild disabilities.
- need help for a short time due to a temporary condition.

What can a supporter legally do?

A supporter has legal authority to:

- access the adult's personal information needed to make decisions.
- help the adult communicate decisions.

Your supporter cannot be your guardian or trustee.

How is a supported decision-making authorization created?

Identify someone you trust who is 18 or over to be your supporter(s) and discuss your decision-making preferences with them. This includes your values, beliefs and goals as well as any specific decisions that you may need help with. Visit the [supported decision-making page](#) on Alberta.ca to fill out the authorization form. A supported decision-making authorization is not registered anywhere, so the supported adult and the supporter should both have a copy.



Tips for Facilitators

Start with the basics of supported decision-making.

- Provide information on the process of supported decision-making in a format that is best suited to your audience.
- Allow time for questions and discussion to address any concerns or misconceptions.

Provide resources and support.

- Public facing information on supported-decision making can be found on CompassionateAlberta.ca on the [Supported Decision-Making page](#).
- The authorization form can be found on Alberta.ca's [Supported Decision-Making page](#).



Organ and Tissue Donation

What is organ and tissue donation?

Organ donation is when a person's organs (e.g. heart, lungs, kidneys) are removed and transplanted into another person. Tissue donation is when other parts of the body (e.g. bone, skin, eye components) are removed and transplanted into another person. There is no cost to donate organs and tissues.

Whether you wish to be an organ and tissue donor when you die is an important decision. There is no right or wrong answer; it is based on your own beliefs and values.

Why is this important?

Organ and tissue donation can save or improve the lives of people in need of a transplant and can also have important research benefits. It can also be a way for individuals to leave a lasting legacy.

How do I set this up?

You can register online at the [Alberta Organ and Tissue Donation Registry](#), which provides Albertans with a simple method to communicate to healthcare teams and those closest to them through a record of their consent to donate. If you want to be a donor, let the people closest to you and your doctor know. You can also include your decision to donate when you make your personal directive.



Tips for Facilitators

Start with the basics of the donation process.

- Provide information on organ and tissue donation in a format that is best suited to your audience.
- Allow time for questions and discussion to address any concerns or misconceptions.
- Address cultural and religious considerations around donation.

Invite speakers to your sessions.

- Invite a healthcare professional to speak and answer questions on this topic.
- Invite individuals who have been affected by organ and tissue donation, including transplant recipients and their families, to help attendees understand the impact of their decisions to donate.



Provide resources and support.

- [Alberta Organ and Tissue Donation Registry](#) allows people to easily register as a donor online.
- Provide attendees with additional resources on organ and tissue donation by visiting MyHealth.Alberta.ca and searching “Organ and Tissue Donation”.

Encourage conversations.

- Prompt people to talk to their family, friends, healthcare team and spiritual and faith leaders to make an informed decision on being a donor and ensuring their wishes about donation are known and respected.



Financial Planning



How Hakim Has Planned Ahead

Hakim is a few years away from retirement. In preparation for this big change, he is reflecting on what matters most to him in life. He is reviewing his **enduring power of attorney** in which he has appointed his son, Malik, as his **attorney** to make financial and legal decisions if he becomes too sick or injured to make his own decisions. Hakim has also booked an appointment with his financial advisor to make sure he is still on track for his retirement. He wants to be financially stable but also fulfill his lifelong dream of travelling around Europe with his wife.

It is important for Albertans to plan ahead for their financial future, as Hakim has done. An important step in this process is creating a legal document called an enduring power of attorney.



Enduring Power of Attorney

What is an enduring power of attorney?

An enduring power of attorney is a legal document that outlines your financial instructions and who will make decisions for you (your **attorney**). It is written when you have capacity, and it can come into effect either:

- in the future if you lose capacity (e.g., illness that prevents you from making your own decisions).
- immediately and continuously if you lose capacity (e.g., you need help managing your financial matters now and but also if you are ill and unable to make your own decisions).

Who needs an enduring power of attorney?

Every adult 18 years and older should have one.

Who can I choose to be my attorney?

Your attorney does not have to be a **lawyer**. It should be someone 18 years and older who you trust to protect and manage your assets and pay your bills on your behalf. This can be a trusted family member, friend or advisor.

You can name one or more people to be your attorney. If you name more than one person, you can state whether they are to act separately or jointly. It is also a good idea to specify how you want them to exercise their authority, make decisions and communicate with each other.

How do I set this up?

There are no regulated forms for creating an enduring power of attorney on your own. It is best to work with a lawyer to make sure your financial interests are protected and your enduring power of attorney is legal, especially if your estate is complex. You must have capacity at the time you sign your enduring power of attorney document.

An enduring power of attorney will stay in effect until you change it, cancel it or die. It can be changed at any time as long as you have capacity. When you die, the authority for decision-making concerning your estate then shifts to the **personal representative** you have named in your **will**.

Keep your original enduring power of attorney in a safe place, tell the person named as your attorney that you have made an enduring power of attorney and let them know where it is kept or give them a copy. Review your enduring power of attorney every few years or whenever your life changes (e.g., change in health, becoming a new parent).

Why is it important?

If you do not have an enduring power of attorney and you lose the capacity to manage your finances, someone will have to apply to the court to be appointed to deal with your finances



and property. This takes time and money and you will not have a say in who will be appointed. No one, not even your spouse or adult child, has the legal power to manage your financial matters without an enduring power of attorney or court order.



Tips for Facilitators

Start with the basics of enduring power of attorney.

- Provide information on enduring power of attorney in a format that is best suited to your audience.
- Allow time for questions and discussion to address any concerns or misconceptions.
- Remind your audience to review and update their documents every few years or following important life events (e.g., health event, becoming a parent).

Invite speakers to your sessions.

- Invite a lawyer or financial planner to speak on the topic and answer questions.
- Invite individuals who have personal experience setting up an enduring power of attorney or acting as an attorney to share their stories and insights.

Offer one-on-one consultations.

- Provide an opportunity for attendees to have one-on-one consultations with a lawyer to discuss their specific situations and concerns.

Provide resources and support.

- Public facing information on enduring power of attorney can be found on CompassionateAlberta.ca on the [Enduring Power of Attorney page](#).
- Provide attendees with additional resources and on enduring power of attorney and legal supports provided on the [Resource Directory page](#) on CompassionateAlberta.ca.
- This toolkit includes a [plan ahead checklist](#) to support people in planning and protecting what matters most to them.
- Connect attendees with local legal, financial or other support services on this topic.



Estate Planning



How Alice Has Planned Ahead

Alice is 30 years old. Her aunt, Helen, passed away without a **will** or known funeral wishes, which left her family in a difficult situation, unable to make complex decisions. This prompted Alice to think about how to prepare for her own death. She had conversations with her family and reflected on what she wants to happen to the things she owns and her body after she dies.

She learned about wills in Alberta and wrote one outlining how she wants her savings to be distributed, who should get her house and property and who should take care of her cat once she dies. She named her sister as her **personal representative** in her will to carry out these wishes. Alice also attended some local events in her community that helped her think about **funeral planning**. Although it felt overwhelming at times, planning for the unexpected gave Alice a sense of security and comfort.

As in Alice's case, planning for the unexpected is best done earlier rather than later. An important part of planning ahead is preparing your will and funeral planning.



Wills

What is a will?

A **will** is a legal document outlining how you would like your property, possessions and money to be given out after you die. It also allows you to name a guardian for any children who are minors and who will take care of your pet(s) when you die.

Your will allows you to name the person (your **personal representative** or **executor**) who will represent your **estate** after your death and carry out your will.

Who needs a will?

Every adult 18 years and older needs one.

Who can I choose to be my personal representative?

When choosing a personal representative, select someone who is trustworthy, responsible and organized. They should be 18 years or older and willing to take on the responsibilities and duties of the role. It is important to note that personal representatives have legal obligations and must follow the instructions in your will.

How do I create a will?

There are two types of wills:

- A **formal will** is a written document signed in the presence of two witnesses. To be a witness, you cannot benefit from the will you are signing.
- A **holograph will** is a document prepared by you in your own handwriting and signed in your own handwriting. You do not need witnesses for a holographic will for it to be valid.

Adults can complete a formal will by using a lawyer's services, legal will kits or online will services. Some will kits and online will services may not deal with complex issues such as taxes, trusts, charitable giving, personal representative compensation, beneficiaries with special needs, second marriages, stepchildren or adopted children. In these cases, you may want to obtain professional help in preparing a will that is tailored to your situation.

Keep your original will in a safe place, tell the person named as your personal representative that you have made a will and let them know where it is kept or give them a copy. Review your will every few years or whenever your life changes (e.g., marriage, the birth of a child, divorce, death of a family member).

Why is it important to have a will?

In Alberta, without a will, you cannot choose who gets your property and possessions (your **beneficiaries**) and who will carry out your wishes. Instead, your estate will be distributed according to laws in Alberta, which may not align with your wishes or the needs of the people that matter most to you.





Tips for Facilitators

Start with the basics.

- Provide information on wills in a format that is best suited to your audience.
- Allow time for questions and discussion to address any concerns or misconceptions.
- Remind your audience to review and update their documents every few years or following important life events (e.g., health event, becoming a parent).

Consider inviting speakers to your sessions.

- Invite a lawyer to speak on the topic and answer questions.
- Invite individuals who have personal experience setting up a will or acting as a personal representative to share their stories and insights.

Offer one-on-one consultations.

- Provide an opportunity for attendees to have one-on-one consultations with a lawyer to discuss their specific situations and concerns.

Provide resources and support.

- Public facing information on wills can be found on [CompassionateAlberta.ca](https://www.compassionatealberta.ca) on the [wills](#) page.
- Provide attendees with the additional resources and on wills and legal provided on the [Resource Directory](#) page on [CompassionateAlberta.ca](https://www.compassionatealberta.ca).
- This toolkit includes a [plan ahead checklist](#) to support people in planning and protecting what matters most to them.
- Connect attendees with local legal, financial or other support services on this topic.

Funeral Planning

What is involved in funeral planning?

Funeral planning is the process of deciding what you want done with your body after you die and the type of service you want held to honour and remember you.

Funeral preparations can be influenced by personal values and beliefs as well as cultural and religious practices. For example, many cultures have specific customs around the body, mourning periods, funeral attire and use of specific flowers and decorations.



Why is it important to start funeral planning?

Planning your funeral ahead of time can provide you with peace of mind knowing that your wishes will be carried out as you want. Planning it ahead of time also prevents unnecessary financial costs and makes decision-making easier for the people that matter most to you.

Tips for Facilitators

Start with the basics.

- Provide information on funeral planning in a format that is best suited to your audience.
- Allow time for questions and discussion to address any concerns or misconceptions.

Invite speakers to your sessions.

- Invite a funeral director, death doula, estate lawyer, financial planner or grief counsellor to speak on the topic and answer questions.

Host a Death Cafe.

- [Death Cafes](#) are community held events that provide a safe environment to support conversations about death and dying.

Talking about death can be difficult and emotional for some people.

- Provide a safe and supportive environment for your audience to share their thoughts and feelings.
- Recognize and respect the diversity of cultures and traditions in your community and ensure information and resources provided are inclusive of the different beliefs and practices related to funeral planning and death. Please note, some faiths and cultures may not openly talk about death.

Encourage personal stories.

- Encourage attendees to share their own stories and experiences related to death and dying.

Provide resources and support.

- Provide attendees with additional resources on funeral planning from the [Resource Directory page](#) on [CompassionateAlberta.ca](#).
- Encourage attendees to use [games and conversation starters](#) to talk about death and dying with the people that matter most to them.
- Connect attendees with local funeral planning supports, such as religious and cultural organizations, funeral homes and grief support groups.



Appendix:

Preventing Elder Abuse

An important part of planning ahead is talking about your personal information and selecting individuals to help you manage your personal matters. This could potentially put you in a vulnerable position, especially if you are a senior. Unfortunately, in some cases people manage to gain enough of a person's trust to be named a decision-maker only to then abuse their authority for personal gain. If this happens to a senior, it is a form of elder abuse.

Elder abuse is any intentional or reckless act or willful and negligent disregard, occurring within a relationship of family, trust or dependency, directed at someone 65 years of age or older that:

- Causes physical harm;
- Causes emotional or psychological harm;
- Involves the misappropriation or misuse of money or other personal possessions or personal or real property;
- Subjects an individual to non-consensual sexual contact, activity or behaviour; or
- Fails to provide the necessities of life.

Any senior can become a victim of elder abuse regardless of gender, sexual identity, race, ethnicity, income or education.

Consider the following to help protect yourself against elder abuse:

- When choosing an agent, attorney or personal representative: have you known this person long enough or well enough to feel that you can trust them with your personal matters?
- People who have trouble handling their own money, lack steady employment or have addictions or gambling problems may not be a good choice for an agent, attorney or personal representative.
- Include instructions in your enduring power of attorney that require the attorney(s) to provide regular financial updates to trusted people.
- Specify in power of attorney documents that in the event of a dispute, monies can be used for mediation services.



Tips for Facilitators

Start with the basics.

- If your audience is older adults, provide information on elder abuse with the other topics in this toolkit.



- Allow time for questions and discussion to address any concerns or misconceptions.

Provide resources and support.

- Provide local and regional community supports for seniors such as:
 - 911 if you or someone you know is being abused and is in immediate danger.
 - Family Violence Info Line 310-1818, where information, advice and referrals is available 24-hour, toll-free in more than 170 languages.
 - The Alberta government's [Elder Abuse, Get Help webpage](#), which provides information on how to recognize signs of elder abuse and how to get help.
 - [Alberta Elder Abuse Awareness Council](#), a group of Albertans dedicated to increasing awareness and supporting a community response to elder abuse.



Glossary

Advance care planning:

How to think about, talk about, and document the health and personal care you want to receive now and in the future.

Agent:

A trusted person named in a personal directive who will make decisions for a person who is unable to make their own decisions.

Alberta Organ and Tissue Donation Registry:

A government-operated registry which provides Albertans a way to record and communicate their wishes to healthcare teams and those closest to them.

Attorney:

The person named in an enduring power of attorney document to deal with your financial matters.

Beneficiaries:

People or organization(s) who are named in the will that will receive assets or property after a person dies.

Capacity:

A person's ability to make decisions for themselves. It involves having the necessary mental, physical and emotional abilities to understand the information related to a decision, evaluate the options and communicate a choice.

Elder abuse:

Any intentional or reckless act or willful and negligent disregard, occurring within a relationship of family, trust or dependency, directed at someone 65 years of age or older that causes physical, emotional or psychological harm; involves the misappropriation or misuse of money or other personal possessions or personal or real property; subjects an individual to non-consensual sexual contact, activity or behaviour; or fails to provide the necessities of life.

Enduring power of attorney:

A legal document that outlines your financial instructions and who will make financial decisions for you.

Estate:

The property a person owns at the time of their death, including land, possessions, investments and money. It includes all assets and debts that a person has left behind.

Full resuscitative care:

Medical treatment given to a person whose heart has stopped beating or who has stopped breathing. This treatment includes chest compressions, intubation and use of medications to restart the heart and breathing. It is an aggressive and intensive form of treatment used to save a person's life in an emergency.



Funeral planning

The process of deciding what you want done with your body after you die and the type of service you want held to honour and remember you.

Goals of Care Designation order:

A set of instructions that the healthcare team involved in a person's care must follow.

Green Sleeve:

A green plastic folder that holds advance care planning form (goals of care designation, personal directive, tracking record).

Lawyer:

A professional who is trained in law and licensed to help you prepare the three key planning documents: the will; enduring power of attorney; and personal directive. Lawyers can also provide legal advice and representation for other matters beyond future planning.

Personal directive:

A legal document that outlines your health and personal care instructions and who will make decisions for you if you become too sick or injured to make your own decisions.

Personal representative:

The person named in a will who is responsible for the administration of the estate, which includes all duties from locating assets, to paying debts and funeral costs, to distributing estate property to beneficiaries. Also known as an executor or administrator.

Supported adult:

An adult who has capacity but wants or needs help making personal decisions.

Supported decision-making:

A process that authorizes a selected person or persons (up to 3) to help a capable adult make personal but not financial decisions.

Supporter:

Individual or individuals selected in a supported decision-making authorization form to help the supported adult make personal decisions (not financial decisions).

Tracking record:

A form your healthcare team uses to track conversations and decisions about your advance care planning and Goals of Care Designation.

Will:

A legal document that outlines how you would like your property and possessions to be distributed after your death.

