



Plan Ahead Starter Kit

Resources on health, financial and
estate planning

October 2024



Covenant Health
Palliative Institute

Disclaimer

October 2024

This Plan Ahead Starter Kit is intended to provide general information only. Every effort has been made to ensure accuracy of the information we share. The contents of this starter kit 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.

Advance Care Planning Checklist

October 2024

Advance care planning includes thinking about, talking about, and documenting the health and personal care you want now and in the future. It is for every adult at any point in life. **To start advance care planning, use the steps and resources below.**

 THINK about your values & goals		Use the My Wishes Alberta Workbook to think through what is most important to you in your life, health and personal care.
 LEARN about your own health		Talk to your healthcare providers about any questions, symptoms or concerns you have about your health. If you need a health care provider, call 811 or visit albertafindadoctor.ca .
 CHOOSE someone to make health & personal choices for you		Choose someone you trust to make decisions for you if needed and ask them if they are willing to do so.
 SHARE your wishes with the people you trust & your healthcare team		Use the My Wishes Alberta workbook, game, or conversation starter on CompassionateAlberta.ca .
 RECORD your wishes in a personal directive		Contact a lawyer or use the Government of Alberta instructions and template to create or update your personal directive.

Review and update your documents following important life events (e.g., a change in health or becoming a parent) and as your goals, values, and wishes evolve. Share these updates with the people close to you and with your healthcare providers.

For more information, visit [CompassionateAlberta.ca](https://www.compassionatealberta.ca)



My Wishes Alberta: Planning for My Care

A workbook to help you explore and
share your health care wishes



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Explore and share your wishes for care.

My Wishes Alberta: Planning for My Care was created to help you reflect on your values and preferences for health and personal care and share this information with the people who matter most to you, as well as with your health care providers. It guides you to think through what is important to you, what concerns you have, and who you want to make decisions for you if you become too sick or injured to choose for yourself. This topic may not be easy to think about, but doing so can prepare you and others to make important decisions about your care now and in the future.

How to use this workbook

- Work through it by yourself or with someone you trust.
- Take time to think about your answers.
- Complete the questions that matter to you.
- Use this workbook to start conversations about your health and personal care.



How can this workbook help?

Preparing for health care decisions

When people get difficult or unexpected health news, they often say that they only heard a small part of what the health care provider said. There is so much information, so many decisions, and so much to think about. Even simple decisions can be hard. Thinking about what matters to you in advance can make a difficult time a bit easier for you and the people close to you.

If you can't speak for yourself

If you get sick or injured and cannot speak for yourself, thinking and talking about your wishes ahead of time:

- Lets the people who matter most know what is important to you.
- Gives you peace of mind that your wishes are known.
- Reduces conflict and stress when decisions about your care must be made.
- Gives you a say in your care.
- Helps your health care providers give you the best possible care.

This workbook is not a legal document and cannot be used to provide consent for treatments. It is not a will or a personal directive and has nothing to do with the distribution of your property or finances. It is a guide to help you organize your thoughts and start having conversations about your health and personal care.

What matters most to you?

First, think about the following: What is important to you? What do you value most in your life? These answers will help you prepare to talk with the people that are close to you and with your health care providers.

Who are the most important people in your life?

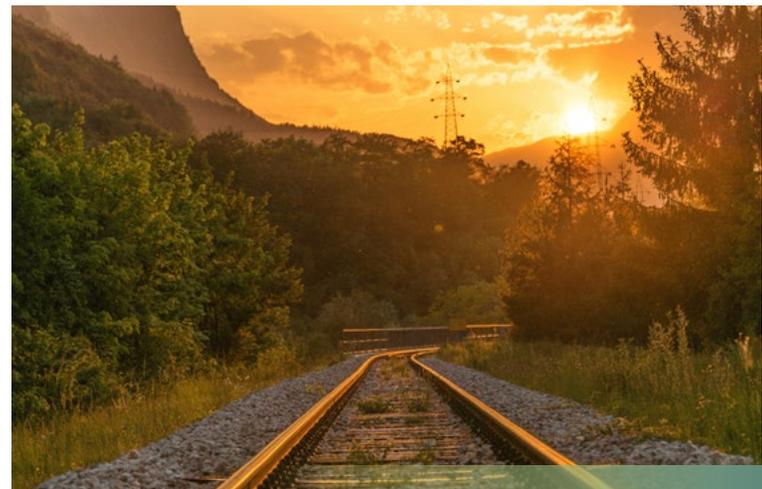
(For example: family members, friends, spiritual or religious guides, mentors, support people)

What brings you joy and makes your life meaningful?

(For example: spending time with family or friends, spiritual or religious practices, work, hobbies, contributing to your community, being outside, physical activities)

Do you have spiritual, cultural, or religious beliefs that are important to you?

What have you learned in your life that you want to share with others?



Thinking about your wishes for care

Next, think about your wishes for your care and what you value the most. How would you like your physical, emotional, social, and spiritual needs met?

If you were to get very sick, what would matter the most to you?

(For example: being able to spend time with your family and friends, being in your own home, having people around you who speak your language, being pain-free, being treated with dignity)

If you were to get very sick, what would you be most worried about?

(For example: being in pain, being alone, needing to leave your home or community to receive care, that the people you care for are looked after, finances)



What would you want your care providers to know about you as a person so that they could give you the best possible care?

“I follow a traditional lifestyle and that would be part of my expectations in my care – that it would be incorporated into Western medical interventions. That might mean plant medicines, teas, or even ceremonies in a medical context. I would want my health care providers to support this.”

Think about the following questions.

There are no right or wrong answers. Select the answer that best matches your wishes. You can also add your thoughts on the lines below each question.

If you were to get very sick...

How much information would you like about your illness and treatment?

All Some None

How much say would you like to have about your treatment and care?

All Some None

Would you like your health care provider to tell you their estimate of how long you have to live?

Yes No Maybe

Would you want to receive medical treatments to help you live as long as possible, even if they made you sick, uncomfortable, or unable to live the way you want?

Yes No Maybe

Would you want traditional, alternative, or complementary medicine as part of your care?

Yes No Maybe

Would you want to live as long as possible, even if it meant leaving your community?

Yes No Maybe

Would you want the people close to you to follow your wishes exactly, even if they did not agree with them?

Yes No Maybe

Would you want the people close to you to know everything about your health?

Yes No Maybe

Where would you prefer to spend your last days?

(For example: at home, in a hospice, in a hospital, in a nursing home)

If you had to leave your home or community for care, who would you like to be with you? What personal things would you like to take with you?

(For example: photos, clothing, comfort supplies, spiritual, religious, or cultural items)

If you needed help with your personal care (e.g., bathing, brushing your teeth, grooming, getting dressed, going to the toilet), **who would you be most comfortable with helping you?**

Who would you not want to help you?

Do any of the important people in your life disagree with your wishes?

Are there things you still need to talk about with the people close to you?

(For example: finances, who will take care of your dependants or pets, ceremonies or funeral plans, unfinished personal matters)

Talking about your wishes

Now that you have thought about what matters to you, it is important to share your thoughts with the people who matter most (parents, children, partner/spouse, siblings, friends, Elders, religious leaders, or others) so that everyone is aware of your wishes. If there are things that you and those close to you disagree on, it is helpful to know this and talk about it.

You may also use this workbook as a guide to help you talk with your doctor, nurse, or other health care providers about your wishes for care. If you have an existing health condition, you may also want to ask any questions you have about your health, treatment options, and what to expect in the future.

Here are some ways to start the conversation:

"I've just filled out this workbook called *My Wishes Alberta*. It's about planning for future health care, and I want to share it with you."

"My health is good right now, but I want to talk to you about what I'd want if my health were to change."

"I was talking with my health care provider, and they encouraged me to think about making a plan in case I develop an illness in the future. Can you help me?"

"One of my biggest fears is that if I got sick, the people close to me would argue with each other about what is best for me. I want to share with you what I want so that everyone understands."

"I was thinking about what happened to _____ when they got sick, and it made me realize that I would never want those things to happen to me."

Making sure your wishes are honoured

Now that you have shared your wishes with the important people in your life, you may want to choose one or two people you feel would honour your wishes and be able to make future health and life decisions on your behalf if you became too sick or injured to speak for yourself. In Alberta, this person is called an **agent** and is appointed by completing a legal document called a **personal directive**. The person(s) you name as your agent must be at least 18 years old and have the mental capacity to make decisions on your behalf.

For more information, visit <https://www.alberta.ca/personal-directive.aspx>

When choosing an agent, think about the following:

- Do you trust this person to make decisions for you?
- Can this person communicate clearly with your health care team?
- Can this person make difficult decisions in stressful times?



I would want my eldest son to speak for me if I couldn't speak for myself because he knows what matters most to me when it comes to my care. It's important to me that the rest of my family supports him in the decisions he makes.

Once you have selected the person(s) that you would like to speak for you, ask if they are willing to be your agent and share your wishes with them. If you name more than one agent, make sure you speak to each person about your wishes. Talk with the other important people in your life, as well as your health care providers, to ensure everyone understands what's important to you. This will help them better support the person(s) speaking for you when decisions about your care need to be made.

You can always change your mind about your preferences for care as things change. You can also choose a different agent(s) at any time. It is important to talk about any changes with the people close to you.

ADDITIONAL RESOURCES

For more information on advanced illness, advance care planning, palliative care, end-of-life care, and grief, please visit:

Compassionate Alberta: <https://compassionatealberta.ca/>

Advance Care Planning: Preparing for Your Future Healthcare
<https://myhealth.alberta.ca/HealthTopics/Advance-Care-Planning>

Canadian Virtual Hospice www.virtualhospice.ca

Living My Culture www.livingmyculture.ca



**Did you find this workbook helpful?
Please share your feedback by taking
our survey.**

<https://redcap.link/mywishes>

ACKNOWLEDGEMENTS

This workbook has been adapted by the Covenant Health Palliative Institute from the original document, *Coming Full Circle: Planning for My Care*, created by the Canadian Virtual Hospice and an Elders' and Knowledge Carriers' Circle.

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Research Team, Lakehead University (2015). *Developing Palliative Care Programs in First Nations Communities: A Workbook, Version 1*, eolfn.lakeheadu.ca

Canadian Hospice Palliative Care Association,
advancecareplanning.ca

The Conversation Project for providing the Canadian Virtual Hospice with permission to extract, adapt, and use material located in the following document:

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This workbook was adapted from the Coming Full Circle booklet originally prepared by the Canadian Virtual Hospice and an Elders' and Knowledge Carriers' Circle. Canadian Virtual Hospice collaborated with the Covenant Health Palliative Institute to adapt the original booklet for Albertans. The views expressed here do not necessarily represent the views of the Canadian Virtual Hospice or the Elders' and Knowledge Carriers' Circle.

This is not a legal document and cannot be used to provide consent for treatments. It is not a will or a personal directive and has nothing to do with the distribution of your property or finances. It is a guide to help you explore your thoughts and to start having conversations about your health and personal care. It is intended to provide general information only. Every effort has been made to ensure the accuracy of the information. The contents do not constitute medical or legal advice and should not be relied upon as such. If you have questions about your health or medical issues, speak with a health care provider. If you have questions about your legal rights or someone else's, speak with a lawyer or contact a community legal clinic.



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Overview of the Key Planning Documents in Alberta

October 2024

Planning document	Who needs it?	Purpose	When does it come into effect?
Personal Directive	Every Albertan 18+	To document your health and personal care instructions and appoint an agent* who will make decisions for you about personal matters (non-financial)	Only if you lose capacity
Goals of Care Designation Order	Albertans who do not want full resuscitative care or when it is not medically appropriate. To find out if you need a GCD order, talk to your healthcare provider	To describe and communicate the general aim or focus of care including the preferred location of that care	Immediately. It is especially important in a medical emergency
Supported Decision-Making Authorization	A capable adult who wants or needs help making personal decisions	To appoint a supporter* who can access your personal information and help you make personal, non-financial decisions	Immediately
Enduring Power of Attorney	Every Albertan 18+	To outline your financial instructions and appoint an attorney* who will make financial decisions for you while you are alive	You can specify either of these times: (1) immediately and continuing if you lose capacity Or (2) only if you lose capacity
Will	Every Albertan 18+	To name a guardian for any children who are minors, instruct how to distribute your property and possessions and appoint a personal representative* who will carry out these instructions	After your death

* An appointed individual must be 18 years of age or older. This may be a family member, friend, or trusted advisor.

Planning for the Future



Have you planned for who will look after your personal and financial affairs when you no longer can?

Have you planned for who will deal with your estate when you pass away?

Are your plans set out in the appropriate legal documents?

Every adult should have 3 legal documents:

1. a Personal Directive,
2. an Enduring Power of Attorney, and
3. a Will.

You must prepare these documents while you still have **mental capacity**.

***Mental capacity** is the ability to understand information that is relevant to making a decision and the ability to appreciate the reasonably foreseeable consequences of the decision.*

Documents used while you are still alive

Personal Directive

- Gives someone (your Agent) the right to make decisions for you (the Maker) about personal, non-financial matters (such as health care, housing and medical treatment) while you are still alive
- Comes into effect when you no longer have mental capacity to make personal decisions
- Made by completing the Personal Directive form provided by the Office of the Public Guardian and Trustee or retaining a lawyer to draft one

→ Additional CPLEA resources:

- *Making a Personal Directive in Alberta*
- *Personal Directive Checklist*
- *Being an Agent in Alberta*

Enduring Power of Attorney

- Gives authority to someone (your Attorney) to deal with your financial affairs (such as about your property, money and taxes) while you are still alive
- Must state that it continues in effect even after you (the Donor) lose mental capacity
- Can come into effect when you lose mental capacity or on some other event stated in the document
- Made by completing a do-it-yourself kit, making your own or retaining a lawyer to draft one

→ Additional CPLEA resources:

- *Making an Enduring Power of Attorney in Alberta*
- *Enduring Power of Attorney Checklist*
- *Being an Attorney in Alberta*

Document used when you die

Will

- Legal statement of how you (the Testator) want your Personal Representative to deal with your estate after your death
 - Made by retaining a lawyer to draft one, completing a do-it-yourself Will kit or writing a Will entirely in your own handwriting (a holograph Will)
- **Additional CPLEA resources:**
- *Making a Will in Alberta*
 - *Wills Checklist*
 - *Being a Personal Representative in Alberta*
 - *Getting a Grant of Probate or Administration in Alberta*

Why do I need these documents?



It is a good idea for every adult to have these three documents. Illness or an accident at any time could claim you or render you incapable of managing your own affairs. If you do not have these documents in place, your family will have to apply to the court for permission to manage your affairs for you.

Get started today!

Read the **free** CPLEA resources listed above and others about planning for future care, and Wills and estates. Download, print or order print copies.

Planning for future care info: www.cplea.ca/planning-for-future-care/

Wills and estates info: www.cplea.ca/willsandestates/

The **Centre for Public Legal Education Alberta**, also known as CPLEA, is a not-for-profit, non-government organization committed to making the law understandable for Albertans. We offer free legal information and learning resources in plain language.

Our resources increase awareness and understanding of the law and empower Albertans to take action and, ultimately, gain better access to justice.

Do I need to see a lawyer?

For each type of planning, it is necessary to record your wishes in a legal document: a personal directive for health and personal planning, an enduring power of attorney for financial planning, and a will for estate planning.

It is possible to prepare these documents without a lawyer. However, lawyers have knowledge and expertise to help capture and protect your wishes in a valid document. Lawyers can also help you choose the best agent/attorney/personal representative.

If you have complex finances or family circumstances (divorce, remarriage or stepchildren) it is especially advisable to talk to a lawyer.

How do I find a lawyer?

Your family, friends, doctor, financial advisor, or accountant may have lawyers they can recommend. You can also find a lawyer using the Law Society of Alberta's lawyer directory

(<https://lsa.memberpro.net/main/body.cfm>)

which provides information about lawyers' years of experience, areas of practice and languages spoken. Some lawyers will come to the hospital to work with you there, in an emergency.

Please note: Neither Covenant Health Palliative Institute nor the Law Society of Alberta recommend or endorse individual lawyers.

What if I can't afford a lawyer?

Before you conclude that you can't afford a lawyer, call or search online to get an idea of prices for these services in Alberta. Some lawyers provide free initial consults. Many firms prepare all three planning documents (personal directive, enduring power of attorney, and will) for a **flat fee (one price for all documents)**.

Organizations offering free or low-cost estate and future planning legal services or referrals:

Calgary

Aboriginal Friendship Centre - Legal Clinic
<https://www.afccalgary.org/>

Calgary Chinese Community Services
Association - Legal Clinic
<https://www.diversecities.org/>

Calgary Legal Guidance
<https://clg.ab.ca/>

Kerby Elder Law Clinic
<https://unisonalberta.com/>

Women's Centre Calgary
<https://www.womenscentrecalgary.org/>

Edmonton

Student Legal Services of Edmonton
<https://www.slsedmonton.com/>

United Cultures of Canada Association - Legal
Services
<https://ucca.ca/>

Community Legal Centre- Edmonton
<https://www.eclc.ca/>

Southern Alberta

Lethbridge Legal Guidance
<https://www.lethbridgelegalguidance.ca/>

Community Legal Clinic - Medicine Hat
<https://communitylegalclinic.net/medicine-hat/>

Central Alberta

Community Legal Clinic - Lloydminster
<https://communitylegalclinic.net/>

Community Legal Clinic - Central Alberta (Red
Deer)
<https://communitylegalclinic.net/>

Northern Alberta

Community Legal Clinic - Fort McMurray
<https://communitylegalclinic.net/>

Grande Prairie Legal Guidance
<https://www.eclc.ca/grande-prairie-clinic>

Province-wide

Alberta Legal Information Service (French)
<https://www.infojuri.ca/fr>

Alberta Legal Coaches & Limited Services
Society - "Ask a Lawyer" public chat forum
<https://albertalegal.org/>

Access to Justice Week
<https://www.albertaaccesstojustice.com/>

Are there resources that can help me prepare my own documents?

If you decide not to talk to a lawyer, the following free resources may help you to understand and prepare your documents. Please note that these sources provide legal information only - they are not legal advice and should not be relied upon as such.

Personal Directive

Government of Alberta

Personal Directive General Information
<https://www.alberta.ca/personal-directive>

Centre for Public Legal Education Alberta

Making a Personal Directive Checklist
<https://www.cplea.ca/wp-content/uploads/PersonalDirectiveChecklist.pdf>

Making a Personal Directive Guide
<https://www.cplea.ca/wp-content/uploads/MakingAPersonalDirective.pdf>

Being an Agent Guide
<https://www.cplea.ca/wp-content/uploads/BeingAnAgent.pdf>

Enduring Power of Attorney

Government of Alberta Enduring Power of Attorney
<https://www.alberta.ca/enduring-power-of-attorney>

Centre for Public Legal Education Alberta

Making an Enduring Power of Attorney Checklist
<https://www.cplea.ca/wp-content/uploads/enduringpowerofattorneychecklist.pdf>

Making an Enduring Power of Attorney Guide
<https://www.cplea.ca/wp-content/uploads/MakingAnEnduringPowerOfAttorney.pdf>

Being an Attorney Guide
<https://www.cplea.ca/wp-content/uploads/BeingAnAttorneyUnderAnEnduringPowerOfAttorney.pdf>

Will

Government of Alberta Wills in Alberta
<https://www.alberta.ca/Wills-in-alberta>

Centre for Public Legal Education Alberta

Making a Will Checklist
<https://www.cplea.ca/wp-content/uploads/WillsChecklist.pdf>

Making a Will Guide
<https://www.cplea.ca/wp-content/uploads/MakingAWill.pdf>

Being a Personal Representative Guide
<https://www.cplea.ca/wp-content/uploads/BeingAPersonalRepresentative.pdf>





Instruction Sheet for Personal Directives Form OPG5521

A personal directive is a legal document allowing you to name a person(s) you trust to make decisions on your behalf after you no longer have the capacity to make decisions.

Your personal directive needs to be written, dated, and signed by you and a witness to be legal.

These instructions help you write a personal directive using the Personal Directive form found at formsmgmt.gov.ab.ca/Public/OPG5521.xdp.

You are the Maker

The first part of a personal directive is a statement saying you are making a personal directive. Clearly print your name so anyone who reads it knows who made the personal directive.

I, _____, make this Personal Directive.

(PRINT name of maker)

You are the maker of this personal directive and will be referred to as the maker for the rest of the form.

Initial beside your item(s) to confirm your choice.

1. Revocation of Previous Directive (Required)

If you are writing a new personal directive to replace your current personal directive, initial the statement about revoking previous personal directives.

If you have never written a personal directive before, check 'Not Applicable'.

2. Designation of Agent (Required)

An agent is someone you name to make decisions for you when you no longer have the mental capacity to make these decisions.

You have three options:

- You can name one or more agent(s) and you choose the areas they will have authority. It is strongly recommended you pick someone you trust who will be able to carry out this role. Make sure your agent(s) is able and willing to act in this role. Look at your personal directive regularly to make sure your agent(s) continues to be able and willing to act in this role.
- You can name the Public Guardian as your agent if you do not have any other family or friends able and willing to act as your agent(s). The Public Guardian must agree to being designated as agent before being named. Contact the Public Guardian's office closest to you and ask about naming the Public Guardian as your agent.

Write your personal directive.

www.alberta.ca/personal-directive.aspx

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- You can decide to not have an agent and your personal directive only would provide instructions to service provider(s).

3. Areas of Authority (Required)

You can give your agent(s) decision-making authority for all personal matters like health care and accommodation after you no longer have mental capacity. You can also identify which personal matters are included and which agent(s) has authority over each matter. This allows you to be clear when different agents are named for different personal matters.

4. Designation of Agent for Temporary Care and Education of Minor Child(ren) (Optional)

You can name an agent to make decisions for temporary care and education of your minor children. This agent might be different from the other agent(s) you have chosen and will continue to make decisions for your children until the court appoints a legal guardian of your minor children.

If you do not wish or need to, check 'Not Applicable'.

5. Specific Instructions (Optional)

You can give specific instructions to your agent(s). This might include instructions on health care matters, like medical treatments. It is a good idea to talk about these instructions with your health care provider so they can give you accurate information.

You can provide instructions to service providers if you do not name an agent. It is important you talk about these instructions with health care providers to make sure your instructions follow your wishes.

If you do not want to provide any written instruction, check 'Not Applicable'.

6. Other Information (Optional)

You can include information about your religious beliefs, cultural preferences or other things to guide your agent(s) in decision making.

If you have no information to add, check 'Not Applicable'.

7. Who Determines my Capacity (Optional)

You can name a person you trust to assess your capacity in order to bring your personal directive into effect. This person should know you well, such as a close family member or friend. The person you name here would assess your capacity according to the Personal Directives Act Regulation after consulting with a physician or psychologist. A Declaration of Incapacity to Make Decisions about a Personal Matter (Schedule 2) found at formsmgmt.gov.ab.ca/Public/OPG5522.xdp will need to be completed by the person you choose and the physician or psychologist to assess your capacity.

Write your personal directive.

www.alberta.ca/personal-directive.aspx

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If you do not name someone to assess your capacity, two service providers, one of whom must be a physician or psychologist, will assess your capacity.

If you have no information to add, check 'Not Applicable'.

8. Notification (Optional)

You can name someone in addition to your agent(s) to be notified when your personal directive is in effect.

If you do not wish to do this, check 'Not Applicable'.

9. Signatures (Required)

Your personal directive must be signed and dated in front of a witness. There are certain persons who cannot be a witness and they are listed on the form. Read the 'Notes' section on the form carefully.

10. Acknowledgement (Recommended)

The person(s) you name as agent(s) can acknowledge their future role. They will have the opportunity to read your personal directive to make sure they understand your wishes before having to make decisions. This also reassures health providers your agent(s) is aware they have been appointed.

Safekeeping

Do not submit your personal directive to the court or the Office of the Public Guardian and Trustee (OPGT).

Keep your personal directive in a safe place with your other advance care planning documents, such as your enduring power of attorney and will.

Give a copy of your personal directive to your agent(s), your doctor and any other key people such as service providers.

Register your personal directive

You can register your personal directive with the Government of Alberta so physicians can find out if you have a personal directive and how to contact your agents.

More information about the personal directive registry, including how to register your personal directive, can be found at www.alberta.ca/personal-directive.aspx.

If you have questions about personal directives after reviewing our website and publications available on our website, please email personal.directives@gov.ab.ca or phone our toll free line at 1-877-427-4525.

Write your personal directive.

www.alberta.ca/personal-directive.aspx

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Protected A (when completed)

I, _____, make this Personal Directive.
name of maker

This Personal Directive takes effect with respect to personal matters that relate to me when it is determined, in accordance with the *Personal Directives Act*, that I do not have capacity to make personal decisions with respect to those matters.

I have placed my initials next to the provisions in this document that form part of my Personal Directive.

1. Revocation of previous personal directive

Not Applicable

Initials _____ I revoke all previous personal directives made by me.

2. Designation of agent

Option One

Initials _____ I designate the following as my agent(s)



OR

Option Two

Initials _____ I designate the Public Guardian as my agent.

I have consulted with the Public Guardian and the Public Guardian is satisfied that no other person is able and willing to act as my agent. The Public Guardian has agreed to be my agent.

OR

Option Three

Initials _____ I do not wish to designate an agent, but provide the following information and instructions to be followed by a service provider who intends to provide personal services to me.

3. Areas of authority

Option One

Initials _____ I give my agent(s) the authority to make personal decisions on my behalf for all the personal matters, of a non-financial nature, that relate to me.

OR

Option Two

Initials _____ I give the following agent(s) the authority to make personal decisions on my behalf for all the following personal matters, of a non-financial nature, that relate to me.

Initials _____

Health Care

_____ name(s) of agent(s)

Initials _____

Accommodation

_____ name(s) of agent(s)

Initials _____

With whom I may live and associate

_____ name(s) of agent(s)

Initials _____

Participation in social activities

_____ name(s) of agent(s)

Initials _____

Participation in educational activities

_____ name(s) of agent(s)

Initials _____

Participation in employment activities

_____ name(s) of agent(s)

Initials _____

Legal matters

_____ name(s) of agent(s)

Initials _____

Other personal matters

_____ name(s) of agent(s)

Describe other personal matters (if applicable):

4. Designation of agent for temporary care and education of minor child(ren) (optional)

Not applicable

Initials _____ I designate _____ as an agent who has the authority to take over the care and education of my minor child(ren) until one of the events described in section 7(1)(e) of the *Personal Directives Act* happens.

5. Specific instructions (optional)

Not applicable

Initials _____ I instruct my agent(s) to carry out the following specific instructions when making decisions about my personal matters:

Not applicable

Initials _____ If I have not designated an agent, or if my agent(s) are unable or unwilling to make a personal decision or cannot be contacted after every reasonable effort has been made, I instruct a service provider who intends to provide personal services to me to follow the following instructions that are relevant to the decisions to be made:

6. Other information (optional)

Not applicable

Initials _____ I provide the following information to help my agent(s) understand my wishes, beliefs and values when making decisions about my personal matters:

7. Who determines my capacity (optional)

Not applicable

Initials _____ I designate _____ ,
name of individual(s)

to determine my capacity under section 9 of the *Personal Directives Act*.

8. Notification (optional)

Not applicable

Initials _____ If a determination is made under the *Personal Directives Act* that I lack capacity to make personal decisions, I instruct the person making the determination to provide a copy of the declaration to me, the agent(s) I have designated in this Personal Directive, if any, and following people:

9. Signatures

Signed by me in the presence of my witness at _____, in the Province of Alberta,
location

this _____ of _____, _____
day month year

Notes:

Witness should also initial provisions initialed by maker.

The following persons may not witness the signing of a Personal directive:

- A person designated in the directive as an agent
- The spouse or adult interdependent partner of a person designated in the directive as an agent
- The spouse or adult interdependent partner of maker
- A person who signs the directive on behalf of the maker
- The spouse or adult interdependent partner of a person who signs the directive on behalf of the maker

name of maker signature of maker

address of maker

name of witness signature of witness

address of witness

10. Acknowledgement (optional)

I (We) acknowledge that I (we) have received a copy of this personal directive.

_____ Name of Agent	_____ Signature of Agent
_____ Location where signed	_____ Date of Signing yyyy-mm-dd
	_____ Telephone Number of Agent
_____ Address of Agent	_____ Email Address of Agent

[Add Name](#) [Remove Name](#)

Planning Ahead Checklist

October 2024

Review and update your documents after life events (e.g., change in health or marital status) or as your goals and values change. Share these updates with the people you trust and your health care providers.

Health and Personal Planning			
✓	Date	I have...	Notes
		made a personal directive outlining my health and personal care instructions and who I want to make decisions for me if I am unable (agent(s)).	
		talked about the instructions in my personal directive with my agent(s) and the people I trust and have given them a copy.	
		talked to my health care provider about my personal directive and whether I need a goals of care designation (GCD) order .	
		<ul style="list-style-type: none"> • If applicable: my doctor has completed a GCD order for me with my input. 	
		put my personal directive and GCD order into a green sleeve and stored it on or near my fridge.	
		thought about whether I need a Supported Decision-Making Authorization .	
		<ul style="list-style-type: none"> ✘ If applicable: I have chosen and authorized my supporter. 	
		thought about whether I want to be an organ or tissue donor .	
		<ul style="list-style-type: none"> ✘ If applicable: I have registered my intent to donate with the Alberta Organ and Tissue Donation Registry and told the people I trust. 	
Financial Planning			
✓	Date	I have...	Notes
		made an enduring power of attorney outlining my financial instructions and who I want to make decisions for me (attorney(s)).	
		talked about the instructions in my enduring power of attorney with my attorney(s) and the people I trust and have given them a copy.	
Estate Planning			
✓	Date	I have...	Notes
		made a will outlining how to distribute my possessions and property when I die and who will carry out these instructions (personal representative(s) or executor(s)).	
		talked about my instructions in my will and given a copy to my personal representative(s).	
Other			
✓	Date	I have...	Notes
		Created a letter of instruction that includes details on how to find and manage personal and financial information.	
		Created a detailed contact list of important personal relationships and professional advisors.	
		Found a safe place to store keys and passwords securely.	