

Estate Planning Checklist

A short companion to Parkinson Canada's Will planning guide

This checklist is designed as a lighter companion to the full Will planning guide. It highlights the main decisions, records, and contacts to review before meeting with your lawyer, notary in Québec, or an online Will-making platform.

How to use this checklist

Use it as a quick review tool rather than a replacement for the full guide. It is not legal, tax, or financial advice. It is simply a place to organize key decisions and document locations.

1. Your Will and estate decisions

- ☐ Confirm whether you have a current Will, where the original is stored, and who has access to it.
- ☐ Decide who you want to include, including loved ones, charities, and any specific gifts.
- ☐ Choose your executor/trustee/liquidator and name an alternate.
- ☐ Review beneficiary designations for RRSPs, RRIFs, TFSAs, pensions, and life insurance.

Review your Will every three to five years, or sooner if your family, finances, health, location, or charitable wishes change.

2. People who may act on your behalf

- ☐ Record contact details for your executor/trustee/liquidator and alternate.
- ☐ Choose who would manage property or financial decisions if needed.
- ☐ Choose who would make personal care or health decisions if needed.
- ☐ Consider any advance healthcare directive/living Will or social media instructions.

A Power of Attorney may allow someone to make certain decisions while you are living, but it cannot make or change your Will.

3. Financial, property, and personal records

- ☐ Prepare a simple balance sheet of assets and liabilities, including bank accounts, investments, registered accounts, pensions, insurance, debts, and business interests.
- ☐ Collect property deeds, mortgage documents, vehicle ownership, and other title records.
- ☐ Keep key personal documents together, such as birth, marriage, separation or divorce, citizenship, social insurance, and tax records.
- ☐ Tell your executor/trustee/liquidator where these records are stored.

Keep this information in a secure place and let your executor/trustee/liquidator know how to access it when needed.

4. Digital information and personal wishes

- ☐ Make a secure list of important digital accounts, subscriptions, photos, documents, and digital financial assets.
- ☐ Do not place passwords directly in your Will; use a secure password manager or safe access instructions.
- ☐ Record funeral or celebration-of-life preferences, including any prepaid arrangements.
- ☐ Note any preferred charities for memorial donations.

Review digital access instructions regularly and avoid storing passwords in documents that may become public or difficult to update.

5. Charitable gift planning

- ☐ Decide whether you would like to include a charitable gift once loved ones are cared for.
- ☐ Choose the type of gift: residuary, specific, or contingent.
- ☐ If including Parkinson Canada, use the legal name: Parkinson Canada Inc.
- ☐ Record the charitable registration number: 10809 1786 RR0001.

Ask your advisor to confirm that any charitable gift language reflects your wishes and uses the organization's correct legal name.

A note on gifts to Parkinson Canada

Your gift can be used where the need is greatest or directed to a broad area of Parkinson Canada's work such as care and support, education, research, or advocacy. Parkinson Canada's legacy team can provide sample wording for your advisor and discuss your wishes confidentially.

Helpful Information

If you are thinking about a legacy gift, please contact us. We would be delighted to work with you and your advisors to help you achieve your legacy goals. You can reach out to us by telephone or email.

Phone	1-888-664-1973
Email	planned.giving@parkinson.ca
Website	parkinson.ca

You may want to share the information below with your lawyer, notary, or financial advisor, who can help ensure your wishes are properly documented:

Legal name

Parkinson Canada Inc.

Address

Parkinson Canada
4211 Yonge Street, Suite 316
Toronto, ON M2P 2A9
Canada

Charitable registration number

10809 1786 RR0001

Please consult a lawyer or notary when making changes to your Will.