Your Will planning guide

A practical guide to preparing your Will, protecting your wishes, and creating a lasting legacy.

This guide walks you through everything you need to know to plan your Will with confidence—including how to leave a lasting gift to the Parkinson's community.

Parkinson Canada

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Thank you for requesting the Parkinson Canada Will planning guide.

This guide is designed to help you take the first steps toward creating or updating your Will by gathering important information and considering some key decisions.

Knowing the assets that make up your overall Estate—and how you want them distributed—will save time when you visit your lawyer, notary, and/or use an online Will writing platform.

As you consider the legacy you would like to leave, we invite you to consider including Parkinson Canada in your Will. Your future gift can help improve the lives of people and families affected by Parkinson's by advancing research, improving care, and providing vital education, advocacy, and support services. We are here to support you along the way and would be honoured to be part of the lasting impact you create.

Getting started

Where do I begin?

STEP 1: Read your Will planning guide

This guide is designed to provide an overview of the considerations for planning or updating your Will. As you read this guide, make notes and jot down any questions, including whether you'd like to include a charitable gift in your Will.

STEP 2: Fill in the worksheets

The Planning your Will worksheets will help you consider the key decisions you need to make. These worksheets also capture most of the details that a lawyer (or in Québec, a notary) requires to draft your Will, making your meetings more productive.

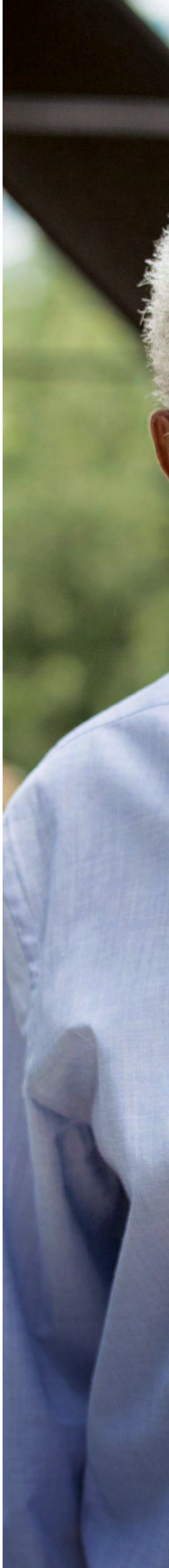
STEP 3: Meet with a lawyer/notary or connect to an online Will making platform

Once you've gathered your information, the next step is to formalize your Will. You may choose to work with a lawyer, notary, or use a trusted online Will making platform. A qualified professional or reputable tool can help ensure your Will is clear, complete, and legally valid, making the process easier for your executor, trustee, or liquidator. Be sure to have your completed Planning your Will worksheets on hand to guide the discussion.

STEP 4: Connect with Parkinson Canada if you're considering a gift in your Will

If you're considering a gift to Parkinson Canada in your Will, thank you. Your generosity will help create a better future for people and families affected by Parkinson's for generations to come.

Our team is always happy to answer questions, work with you and your advisors and help ensure your wishes are clearly understood and honoured.



We’re here to help!

For more information, reach out to: planned.giving@parkinson.ca or call 1-888-664-1973.

Key elements of an Estate plan

It's wise to seek knowledgeable professional advice about what's best for you. Here are some essential elements to discuss with your lawyer, notary, or to consider when choosing an online Will making platform.

Your Will

A Will is a written document that sets out your wishes for the distribution of your assets and personal property after you pass away. It names your choice of trustee—the person legally authorized to carry out the terms of your Will. This role is often referred to as the executor, and in Québec is called a liquidator. Choosing a suitable trustee is an important decision.

Provided you are mentally competent, you can change the terms of your Will or revoke it completely up to the time of your death. You can update your Will by replacing a particular section using a codicil. If you lose the capacity to make decisions, a Power of Attorney can act on your behalf—though it's important to note that a Power of Attorney cannot make or change your Will.

Other important documents

Your Will is only one part of your estate plan. Speak with your legal advisor about preparing a Power of Attorney. This document lets you choose someone you trust to act on your behalf if you are unable to make or communicate decisions during your lifetime.

With a Power of Attorney, the person you appoint can handle specific matters for you—such as managing your finances, dealing with property, or making personal care decisions—depending on the authority you grant them. However, this authority only applies while you are alive. A Power of Attorney cannot create or change your Will. Only you can update your Will, and only while you have the required mental capacity.

- Power of Attorney for property/finances—for managing financial matters:
- Power of Attorney for personal care—for decisions about your health and well-being:
- Advance Healthcare Directive (or "living Will")—for outlining your care preferences:
- Digital assets and account instructions—to explain how you would like your online accounts, files and digital property managed:

Keep your plan flexible—life changes, and your Estate plans should too

Keep your Will current by reviewing it every three to five years—or sooner if there's a significant change in your life, family, finances, or wishes, such as:

- You've moved provinces or countries.
- There's been a change in your or a loved one's health status.*
- Your family situation has changed due to a birth, death, marriage, or divorce.
- You've made a major property purchase, such as a house, condo, or real estate investment.
- You want to change beneficiaries or executors (especially if any have died or moved away).
- Your charitable plans have changed.
- You've already disposed of assets (like a property or investments) that were left to someone in your existing Will.

** If you or someone you love is living with Parkinson's, reviewing your plans can help you prepare with greater confidence. This may include considering future care needs, reviewing your finances, and planning for possible changes in income or expenses over time.*

Helpful information and resources for living with Parkinson's are available at Parkinson.ca/resources.

Special considerations

Everyone's situation is unique. Your Will may need to include special instructions if you:

- Are divorced, separated, widowed, or remarried
- Have children or stepchildren
- Are in a common-law relationship
- Have dependents with special needs
- Own a business
- Own out-of-country assets, property, or hold dual citizenship

Taxes in an Estate

Canada does not have a federal inheritance tax, but a death may trigger income tax and provincial or territorial estate fees. Certain assets may be deemed sold at fair market value, and RRSP or RRIF balances may be taxable, subject to available exemptions or tax-deferred transfers.

A charitable gift from your Estate, through your Will, registered account, life insurance policy or appreciated securities may reduce taxes while supporting a cause you care about. Because each situation is unique, speak with qualified legal and tax advisors about options that reflect your family's needs, financial goals and charitable wishes.

Tip: Reduce probate fees

Naming a loved one or charity as the beneficiary of life insurance, registered accounts, TFSAs or pension plans may allow those assets to pass directly to them, outside your Estate. This can reduce probate fees. A charitable beneficiary designation may also generate a tax receipt for your Estate, helping offset taxes owing.

Why include a charitable gift in your Will?

- Create a lasting legacy for people living with Parkinson's and their care partners.
- Help reduce taxes payable by your Estate.
- Honour or remember someone special.
- Make a meaningful future gift without affecting your income or assets today.

Please let us thank you

Letting Parkinson Canada know about your future gift helps us honour your wishes, plan ahead and thank you for your generosity. All information is kept strictly confidential.

Email planned.giving@parkinson.ca or call 1-888-664-1973.

Leaving a legacy as a family

At 37, recently married Luc and Julie Cafley Poulin were planning a life together when Parkinson's entered the picture. What didn't change was their resolve to live fully, to love deeply, and make a difference for others.

Twenty-four years later, their family includes two sons, Zach and Theo. They stay active, hopeful, and united—having learned that facing challenges together builds strength and that hope is strongest when put into action.

"Putting a gift in our Will is an expression of our values as a family," Julie says. "Donors to Parkinson Canada have supported us, and we have a responsibility to help others. But even more, we've been thinking about our long-term legacy—what we're going to leave behind."

For Julie and Luc, including Parkinson Canada in their Will wasn't about obligation. It was about possibility—wanting the research, support, and community that helped their family to be there for others.

We take pride in knowing our fight will go on. Someday, our legacy will include the end of Parkinson's.

– Julie

Including Parkinson Canada in your Will

Your lawyer (or notary in Québec) will ensure your Will is complete, coherent, and reflects your wishes. If your Estate is straightforward, you may be able to use an online Will making platform.

To include a gift to Parkinson Canada in your Will, please use our legal name and charitable registration number:

Parkinson Canada Inc.
Charitable # 10809 1786 RR0001

You decide what kind of gift you want to make:

Residuary bequest

Parkinson Canada would receive a percentage of the remainder of your Estate after all expenses have been paid and specific bequests have been paid out. The actual value would reflect any changes in the value of your Estate between the date you make your Will and the date of your death.

Our team is always happy to confidentially discuss your wishes and help ensure they're clearly reflected in your Will. We can even provide examples of bequest wording. Contact us at planned.giving@parkinson.ca or 1-888-664-1973.

Parkinson Canada has partnered with Epilogue Wills Canada to make it easy for you to create your Will. For those with straightforward Estate planning needs, Epilogue offers a simple and affordable option. **As a Parkinson Canada supporter**, you receive a 20% discount when you make your Will with Epilogue.

For more information, scan the QR code or visit: epiloguewills.com/give/pc. You can also contact us at planned.giving@parkinson.ca or 1-888-664-1973.

Specific bequest

This gift specifies a particular amount or asset.

Contingent bequest

Parkinson Canada would receive a share of your Estate only if other beneficiaries have passed away before the bequest is made.

Designating Your Gift

You may choose to allow your gift to be used where the need is greatest or direct your gift to an area of Parkinson Canada's work such as care and support, education, research, or advocacy. These designations help ensure your gift remains impactful over time, while still reflecting what matters most to you.

Did you know?

You can give a gift in your Will with cash, securities, real Estate, or other assets (give us a call to discuss) and can reduce or even eliminate the taxes your Estate would otherwise pay. We strongly encourage you to consult advisors for advice on the best way for you to make your gift, in your particular circumstances.

Worksheets

These worksheets are in two sections.

The **first section** helps you collect information needed to prepare your Will. Taking this information to your lawyer or notary ensures you have answers to most of the questions—and helps you understand what you may have available to leave to loved ones and the causes you care about.

As you will be providing confidential information on these worksheets, be sure to store them securely along with your Will.

The **second section** of worksheets gives your executor, trustee, or liquidator) the information they'll need to administer your Estate. This will help them save time, reduce costs, and ensure your Estate is administered as completely and efficiently as possible.

Section 1: Information to collect for writing your Will

Personal information

Date this information was prepared (mm/dd/yyyy): ______________________

Will information

Do you have a Will already? ☐ Yes ☐ No

Date of Will (mm/dd/yyyy): ______________________

Location of current Will: ______________________

Who has access to the Will? ______________________

Does your spouse/partner have a Will? ☐ Yes ☐ No

Date of Will (mm/dd/yyyy): ______________________

Location of their current Will: ______________________

About you

Full Name: ______________________

Address: ______________________

City/town: ______________________

Province & postal code: ______________________

Mobile #: ______________________

Home #: ______________________

Work #: ______________________

Email address: ______________________

Date of birth (mm/dd/yyyy): ______________________

Place of birth: ______________________

Citizenship: ______________________

Social Insurance Number: ______________________

Occupation: ______________________

Employer: ______________________

Marital status

- ☐ Single
- ☐ Married
- ☐ Widowed
- ☐ Divorced
- ☐ Common-law
- ☐ Other

Date & place of marriage (mm/dd/yyyy): ______________________

Marriage certificate available? ☐ Yes ☐ No

Prenuptial agreement? ☐ Yes ☐ No

Current spouse/partner

Full name: ______________________

Address (if different from your own): ______________________

City/town: ______________________

Province & postal code: ______________________

Mobile #: ______________________

Home #: ______________________

Work #: ______________________

Email address: ______________________

Previous marriage (if applicable):

Name of previous spouse/partner: ______________________

Date of previous marriage (mm/dd/yyyy): ______________________

Date of divorce (mm/dd/yyyy): ______________________

Location of divorce documents: ______________________

Section 1: Information to collect for writing your Will *(continued)*

Executor/trustee/liquidator information

Choosing your executor/trustee/liquidator is an important decision. This person will be responsible for carrying out the instructions in your Will and managing your Estate. Many people choose a spouse, relative, friend, or professional trust company for this role. It's wise to name an alternate in your Will in case your first Executor/trustee predeceases you or is unable to serve.

Note: In Québec, the executor/trustee is called the liquidator.

Executor/trustee

Name: ______________________________

Relationship to you: ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Co-executor/co-trustee (if applicable)

Name: ______________________________

Relationship to you: ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Alternate executor/trustee

Name: ______________________________

Relationship to you: ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Power of Attorney

Name: ______________________________

Relationship to you: ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Section 1: Information to collect for writing your Will *(continued)*

Guardian information

If you have minor children, it's important to name a guardian for your children in your Will. You may also wish to name an alternate guardian in case your first choice is unable to serve.

Before naming someone as a guardian, we recommend that you discuss the role and responsibilities with them in advance.

Guardian

Name: ______________________________

Relationship to your child(ren): ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Alternate guardian

Name: ______________________________

Relationship to your child(ren): ______________________________

Address: ______________________________

City/town: ______________________________

Province & postal code: ______________________________

Mobile #: ______________________________

Home #: ______________________________

Work #: ______________________________

Email address: ______________________________

Balance sheet

Making a list of your assets and your current liabilities makes it easier for you to decide how to divide your Estate and helps your lawyer/notary prepare your Will.

Assets		Liabilities	
Principal residence		Mortgage	
Other real estate		Second mortgage	

Investments		Credit cards	
RRSPs		Visa	
RRIF		Mastercard	
RPPs		American Express	
Stocks		Other	
Bonds			
Life insurance		Bank loan	
Pension benefits		Personal loan	
Bank accounts		Business loan	
Trust company accounts			
Business interests			
Jewelry		Car loan	
Automobiles		Car lease	
Art			
Valuable furnishings			
Other		Other	

Total assets		Total liabilities	

Section 2: Information to give your executor, trustee, or liquidator

Estate distribution

For many people, this is one of the most meaningful parts of preparing their Will. It's an opportunity to reflect on the people, values, and causes that matter most and to consider the lasting impact they wish to have. It's a decision that requires careful thought. This section is intended to help you decide how your Estate will be shared and who or what cause you wish to support through your Will.

When distributing your Estate, consider using percentages rather than fixed amounts to account for future changes in the size of your Estate.

If you wish to give specific items that are particularly valuable or have sentimental meaning, you can include those instructions in your Will as well.

Person or charitable organization	Specific gift amount, asset, or percentage of Estate to be distributed

Special comments & notes

Section 2: Information to give your executor, trustee, or liquidator

Protect your information: This guide may contain confidential personal and financial details. Keep it in a secure location. Do not record passwords, PINs or access codes directly in this guide.

Funeral arrangements

Have funeral arrangements already been made? ☐ Yes ☐ No

Funeral home/provider: ______________________________

Address: ______________________________

Phone #: ______________________________

Location of prepaid contract or documents (if applicable): ______________________________

My wishes:

- ☐ Burial
- ☐ Cremation
- ☐ Celebration of Life
- ☐ Religious / cultural service
- ☐ Private service
- ☐ Other: ______________________________

Beneficiary contact details

Children:

Name, address and birth date of children named in your Will:

Relatives:

Name, address and date of birth of immediate relatives named in your Will:

Mother: ______________________________

Father: ______________________________

Brothers: ______________________________

Sisters: ______________________________

Grandchildren/great-grandchildren: ______________________________

Others:

Name, address and date of birth of others named in your Will:

1.

2.

3.

4.

Charitable organizations:

Name, address and registration number of charitable organizations named in your Will:

1.

2.

3.

4.

Section 2: Information to give your executor, trustee, or liquidator *(continued)*

Location of documents

It's important that your executor/trustee/liquidator knows where your legal and financial documents can be found. You may want to give them this information in advance.

Current Will:

Does your executor/trustee/liquidator have a copy of your Will? ☐ Yes ☐ No

If no, where is the Will located? ____________________

Safety deposit box

Financial Institution: ____________________

Address: ____________________

Box #: ____________________

Key location: ____________________

Original birth certificate: ____________________

Social insurance card: ____________________

Tax records: ____________________

Company retirement and pension papers: ____________________

Military records and pension papers: ____________________

Legal and financial contacts

Your executor/trustee/liquidator may need to contact the following people or organizations when administering your Estate.

Lawyer/notary

Name: ____________________

Company: ____________________

Address: ____________________

City/town: ____________________

Province & postal code: ____________________

Phone #: ____________________

Email address: ____________________

Accountant

Name: ____________________

Company: ____________________

Phone #: ____________________

Email address: ____________________

Insurance

Name: ____________________

Company: ____________________

Phone #: ____________________

Email address: ____________________

Banking

Name: ____________________

Company: ____________________

Phone #: ____________________

Email address: ____________________

Investment advisor

Name: ____________________

Company: ____________________

Phone #: ____________________

Email address: ____________________

Other

Name: ____________________

Company: ____________________

Phone #: ____________________

Email address: ____________________

Section 2: Information to give your executor, trustee, or liquidator *(continued)*

Financial information

Use this section to record important financial accounts, policies, and assets.

Banking & investment

(Savings, chequing, TFSAs, RRSPs/RRIFs, GICs, loans, credit cards, lines of credit, investment accounts, etc.)

Institution	Account #	Type of asset or loan	Name of joint owner/beneficiary	Online access details

Life insurance

Institution	Policy holder	Policy #	Type of policy	Policy value ($)	Name of beneficiary/ beneficiaries

Pension & retirement

Institution	Policy holder	Account #	Type of plan	Policy value	Name of beneficiary/ beneficiaries

Other financial institutions

Institution	Account Type	Account #	Type of asset	Value	Name of beneficiary/ beneficiaries

Digital information

Today, many important parts of our lives are stored digitally. Your executor/trustee may need access to online accounts, records, subscriptions, photos, financial information, or other digital assets in order to properly administer your Estate and carry out your wishes.

For security reasons, you may want to store this information in a secure location, such as:

A password manager: A secure app or program used to safely store and organize passwords and login information.

An encrypted digital file: A password-protected electronic file that helps keep sensitive information private and secure.

A secure home file or fireproof box.

Be sure your executor/trustee knows where this information is stored and how it can be accessed when needed.

Section 2: Information to give your executor, trustee, or liquidator *(continued)*

Personal computers and other electronic devices

Type	User ID	Location of secure access instructions
Mobile phone		
Desktop		
Laptop		
iPad/tablet		
Other		
Other		
Other		

Consider preparing a list of important digital assets and accounts, including where the information is stored and how your executor/trustee/liquidator can access it if needed.

Digital assets checklist

Consider preparing a list of important digital assets and accounts, including where the information is stored and how your executor/trustee/liquidator can access it if needed.

This may include:

- Personal computer and other electronic devices
- Social media accounts
- Banking and finance
- Online shopping accounts (e.g., Amazon, eBay)
- Loyalty cards
- Books, music, and videos or streaming
- Cryptocurrency and exchange wallet
- Gift cards
- Email accounts
- Cloud storage
- Online accounts for utilities
- Subscription accounts (e.g., Amazon Prime, professional journals)
- Blogs and websites
- Photo storage and digital photos
- Apple Pay, PayPal

What your legacy can do

Once your loved ones are taken care of, you can make a difference by leaving a gift to charity. Please consider a gift to Parkinson Canada.

Parkinson's is growing, but health care is not.

Parkinson's is the fastest-growing neurological condition in the world, yet timely, coordinated care in Canada too often falls short.

For many people, the journey begins with long months, or year, waiting for answers, a diagnosis, or access to the right specialist.

After diagnosis, daily life can feel overwhelming. On average, a person living with Parkinson's spends just two hours a year with their neurologist and thousands more managing medications, movement, sleep, and nutrition.

Our overburdened health care system cannot deliver the change needed alone.

As Canada's only national Parkinson's organization, we're leading a bold effort to reduce wait times, connect families to timely support, and build clearer care pathways from the earliest signs through advanced stages.

With more than 50 years of leadership and $37 million invested in research, we're helping turn discoveries into better treatments, care and support for people living with Parkinson's.

Every legacy gift helps future generations receive answers sooner, feel supported longer and live better—so no one faces Parkinson's alone.

Thank you for considering a gift in your Will to Parkinson Canada. To learn more about legacy giving or speak confidentially about the impact your future gift could make, please contact our Legacy team.

planned.giving@parkinson.ca

1-888-664-1973

Parkinson Canada