

Worksheet 9

Tools for the move and for your advisers

Goes with: Chapters 1, 5, 7, 19 and Tools you can copy

Use these pages with your family and your advisers: before the assessment, before you sign with a private home, before the house is listed, and before the first meeting with the estate lawyer and accountant.

Name

Date completed

A. Assessment diary

Fill in a line each day for one or two weeks before the assessment: falls, missed medications, trouble bathing or dressing, eating, night-time needs, wandering, mood, and how the caregiver is coping.

Date	What happened	Who helped

B. Before you sign with a private home

Ask for these in writing

- ☐ The base rent, and what meals, housekeeping, laundry and transportation it includes
- ☐ Extra charges for help with medications, personal care or a higher level of care
- ☐ How much notice is given before fees go up
- ☐ Move-in, administration and damage deposits, and when each is refunded
- ☐ What happens during a hospital stay or other absence
- ☐ The notice needed to leave, and what happens to the room and the rent after a death
- ☐ What happens if care needs grow beyond what the home can provide
- ☐ Every promise is in writing

C. Net proceeds of the sale

Item	Amount (\$)
Expected sale price	
Less the mortgage or line of credit on the house	
Less commission, legal fees and repairs	
Less moving, storage and bridge-financing interest	
Less any deposit or entrance fee for the new home	
Money available for care	

D. Listing readiness: for the family and the realtor

Before the listing

- ☐ Who is on title, and how: alone, as joint tenants or as tenants in common
- ☐ Who will sign: the owner, an attorney (notarially certified copy of the enduring power of attorney, and the declaration if it starts only on incapacity), or a court-appointed trustee
- ☐ Dower: whether the home is a homestead, and whether the spouse will sign the consent or a court order is needed
- ☐ Care timing: whether a Type A or Type B space is expected, and what closing date leaves room
- ☐ Insurance: the insurer knows if the home will be empty
- ☐ Tax: the years the home was the principal residence, and who files Schedule 3 and Form T2091

☐ Valuables appraised, and belongings sorted before showings

E. My advisers

Role	Name	Phone or email
Lawyer		
Accountant or tax preparer		
Financial planner		
Insurance adviser		
Bank		
Realtor		
Case manager		
Doctor		
Attorney (enduring power of attorney)		
Agent (personal directive)		
Executor		

Permission to talk to each other. I give the advisers named above permission to share information with each other about my affairs, so they can work together on my plan. I can withdraw this permission at any time. Some professionals will also ask me to sign their own consent form.

Signed

Date

F. The executor's packet for the first meeting

Bring

- ☐ The will and any codicils, or where the original is kept
- ☐ The funeral home's statement of death, or the death certificate
- ☐ A list of assets and debts, with account numbers
- ☐ The last two tax returns and notices of assessment
- ☐ Insurance policies and beneficiary designations
- ☐ Names and addresses of the beneficiaries and family members

Ask

- ☐ Who applies for the grant, and when
- ☐ Who files the final return, any optional returns and Form T1255
- ☐ Whether the estate will be a graduated rate estate, and who designates it on the first T3 return
- ☐ When to ask for the clearance certificate, and how much to hold back
- ☐ Who keeps the estate accounts, and how often the beneficiaries see them