

Worksheet 4

My property, how it is titled, dower and the order of my move

Goes with: Chapters 7 and 8

List each property, whose name is on the title and how, and plan the move so the house is sold last, empty.

Name

Date completed

A. My property

Property and address	Names on title	How held (my name alone, joint with survivorship, tenants in common)	Mortgage? Insurer

Principal residence: which property, for which years

Sale reported on Schedule 3 (year)

Anyone added to title for convenience: written statement of intent kept where

B. Who can sign if I cannot

My attorney

Alternate attorney

Enduring power of attorney kept where

Starts now, or springs on incapacity?

C. Dower

Married? (yes or no)

Home in my name alone? (yes or no)

Spouse knows consent is needed? (yes or no)

D. The order of my move

Many families find this order works (Chapter 7). Tick each step and add the date.

Step	Date done	Notes
1. Decide where I will live next, and confirm the space, the cost and the date		
2. Move, taking what fits and what I love		
3. Someone who can recognize value looks through everything first; written appraisal for anything valuable		
4. Clear what has no value		
5. Give to family and charity, and write down who received what		
6. Sell the house last, empty		

E. My belongings

Item	Keep, give, sell or donate	To whom or where	Done

Insurer told if the house will sit empty (date)

Who checks on the house

Checklist (Chapter 7)

- ☐ I know who could sign a sale if I could not
- ☐ Any sale has been reported on Schedule 3
- ☐ I have chosen which property is my principal residence for each year
- ☐ If I am married and the home is in my name alone, we both know a sale or transfer needs my spouse's consent
- ☐ I have a plan for the order of my move: where I go, then the contents, then the house
- ☐ I know how much notice my landlord needs, and whether my lease has an end date
- ☐ My condo fees, any special levy and my unit insurance will be paid until the sale closes
- ☐ My important papers and valuables were set aside before anyone cleared the house
- ☐ My care plan includes what gives my day meaning, and someone visits or calls me on a set schedule

Checklist (Chapter 8)

- ☐ Anyone added to my title has a written statement of what I intended
- ☐ Anyone on my title or accounts only for convenience has been checked for the new trust filing
- ☐ My farm or business has a written plan for who runs it if I cannot, and who takes it over
- ☐ If my company was frozen, my attorney and executor know where the freeze documents are kept
- ☐ Any property I pass to family below its value is meant to be kept, and I have a record of that plan