

Personal Estate Planning Guide

This Guide Belongs to:

Beausoleil First Nation Lands & Resources Department

www.chimnissing.ca/lands.html

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Beausoleil First Nation Lands & Resources Department

Estates Unit

Phone : (705) 247-2051 Fax : (705) 247-2239 www.chimnissing.ca/lands.html



PERSONAL ESTATE PLANNING GUIDE

A Practical Resource

Beausoleil First Nation Lands & Resources Department

Administration Building 11 O'Gemaa Miikan Christian Island, Ontario L9M 0A9

Telephone : (705) 247-2051 Fax : (705) 247-2239 Visit our website at <u>www.chimnissing.ca/lands.html</u>

1st Edition

Disclaimer: This Planning Guide is intended to be used as a supporting, best practice guide and is for information purposes only. It is not intended to provide legal advice. Seeking the advice of a qualified lawyer is always recommended in personal estate planning.

PREFACE

BFNLR ESTATES UNIT:

Soon after establishment, the BFNLR Estates Unit was created in response to our BFN members expressing a need for additional support in the area of estates. The Estates Unit has a mandate to support First Nation lands professionals by building capacity, providing training opportunities, and offering tools such as this guide, to help maneuver the often-complex paths of First Nation estates.

INTENDED USE OF THIS GUIDE:

Estate Planning is a very important act that shows you care for the loved ones you are leaving behind. Once completed, the intended use of this guide is to support your estate executor or administer in carrying out your wishes upon your passing. It is a supplementary guide to be used in tandem with a legal Will. It is not meant to replace legal advice or to be used exclusively as your



only mechanism for estate planning. It is best practice to ensure you have a current and legal Will that is accessible by your named executor(s).

A known contributor to the stress of processing an estate is locating key documents and important information. Our hope is that this planning guide relieves some of that stress as all of your information can be located in one convenient place. Keep in mind that there may be some very confidential information contained in this guide and it should be protected and stored with care.

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ABOUT ME

Full Name:				
Alias:	Date of Birth: (mm/dd/yyyy)			
Address:				
Secondary Address:				
Email Address:	Phone Number:			
Status Number:	Social Insurance Number:			
Birthplace:	Citizenship:			
Occupation:				
Marital Status:	Name of Spouse:			
Maiden Name:	Date of Marriage:			
Father's Full Name:	Mother's Full Name:			
Mother's Maiden Name:	Mother's Birthplace:			
Do I have a Will?	Yes No			
Location of the Will:				
Last Updated:				
Lawyer Name:	Phone Number:			

My Executor(s):			
$^{\circ}$ Name:	Phone Number:		
[○] Name:	Phone Number:		
[°] ∩ Name:	Phone Number:		
MY CHOICES			
Use this section to elaborate on your v be briefly noted in your Will, however,	wishes upon your passing. Some of this information may most times it is not.		
Funeral Pre-arranged:	Yes No		
Funeral Pre-paid:	Yes No		
Burial: Yes: No:			
If yes, do you have a cemetery plot? Yes No			
Name of Cemetery:			
Cemetery Section:	Cemetery Lot #:		
Cremation: Yes	No		
Name of Crematorium:			
If yes, where do you wish the ashes to be placed?			
Family Plot Niche	Columbarium Other		
Specify Other:			

Entombment? Yes No			
If yes, do you have a mausoleum crypt	Yes No		
Place of Service:			
Euneral Home:	Address:		
Church:	Address:		
Community Centre:	Address:		
Other:	Address:		
Officiant:	Phone Number:		
I prefer the funeral service: Public	Private		
Viewing for family: Yes No	Viewing for friends: Yes No		
Flower Preference:	Jewelry:		
Clothing:	Glasses? Yes No		
Preferred Music:			
Song(s):			
Pictures:			

Yes

If yes, what are they?

Person(s) to do my eulogy:

$\stackrel{\circ}{\frown}$ Name:	Phone Number:		
$\stackrel{\circ}{\frown}$ Name:	Phone Number:		
🖰 Name:	Phone Number:		
Pallbearers:			
[─] Name:	Phone Number:		
$^{\circ}$ Name:	Phone Number:		
$^{\circ}$ Name:	Phone Number:		
$\stackrel{\circ}{\frown}$ Name:	Phone Number:		
^o Name:	Phone Number:		
[^] Name:	Phone Number:		

OBITUARY INFORMATION

Use this section to elaborate on things that may be contained in your obituary. Also, check the boxes indicating where you would like your obituary to be posted.

Newspaper: Social Networking Website: Community Newsletter: I would like my name to be printed this way: My spouse: Children & their spouses: Grandchildren & their spouses: Great grand children: Siblings & their spouses: Parents: Others to be included in obituary:

Pets:

My education:

Professional designations:

Religious affiliations:

Clubs/associations I belong to:
Achievements:
Charitable donations to:
Picture: Yes No If yes, which one?
Nicknames:
Additional Information:



THINGS THAT MATTER TO ME

This section can be used for a number of situations such as a tool for writing a eulogy or recognizing, and acknowledging special people, places, and important things in your life.

Special memories:

People who made a difference:

The things I am most proud of:

Favourite pastimes:

Places that were special to me:

Favourite quotes:_____

Favourite songs:

Favourite books:

Things that made me laugh:

Things tha<u>t made me cry:</u>

FAMILY & FRIENDS TO NOTIFY

Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	
Name:		
Relationship:	Phone Number:	

CONTACTS TO BE NOTIFIED

Accountant

Company Name:	
Contact Person:	Phone Number:
Bank	
Company Name:	
Contact Person:	Phone Number:
Cable/Satellite	
Company Name:	Account Number:
Contact Person:	Phone Number:
Phone:	
Company Name:	Account Number
Contact Person:	Phone Number:
Clergy:	
Name:	Phone Number:
Dentist:	
Company Name:	
Dentist Name:	Phone Number:
Doctor:	
Practice Name:	
Doctor Name:	Phone Number:
Employer: Company Name:	
Contact Person:	Phone Number:

Eye Doctor:

Company Name:		
Doctor Name:	Phone Number:	
Cym (Hoolth Club)		
Gym/Health Club:		
Company Name:	Account Number:	
Contact Person:	Phone Number:	
Specialists:		
Company Name:		
Contact Person:	Phone Number:	
Utilities:		
Company Name:	Account Number:	
Contact Person:	Phone Number:	
Landlord:		
Company Name:		
company Name.		
Contact Person:	Phone Number:	
Veterinarian Services: Company Name:		
Contact Person:	Phone Number:	
Other:		
Company Name:		
Contact Person:	Phone Number:	
Other:		
Company Name:		
Contact Person:	Phone Number:	

MY ESTATE SETTLEMENT PREPARATION

Upon passing, a series of processes must take place to administer the estate. This next section includes information that will be used to assist in those processes such as: closing bank accounts, notifying insurers, completion of tax returns, etc. A listing of estate assets has not been included in this guide as that information should be included in your Will.

Documents that will most likely be needed:

Social Insurance Num	bers of:			
Deceased	Yes	No	Located in:	
Surviving Spouse	Yes	No	Located in:	
Dependent Children	Yes	No	Located in:	
Birth or Baptismal Ce	rtificates of	:		
Deceased	Yes	No	Located in:	_
Surviving Spouse	Yes	No	Located in:	_
*Dependent Children	Yes	No	Located in:	_
(Only required if there are surviving de				
Marriage Certificate o	or Statutory	Declaration	of Common Law Union:	
Yes No	Located ir	า:		
Prenuptial Agreemen	t:			
Yes No	Located ir	າ:		
Divorce Certificate:				
Yes No	Located ir	ו:		
Funeral Home Statem	nent of Prepa	aid Account	for Funeral Expenses:	
Yes No	-	ו:	-	
All Pertinent Tax Slips	s (T5, T4, pre	vious return	ns, etc.)	
Yes No		າ:		
Vehicle Ownership &	Insurance Sl	lips:		
Yes No		י ו:		
Identification:	_	_		
Passport	Yes	No	Located in:	_
Health Card	Yes	No	Located in:	_
Status Card	Yes	No	Located in:	_
Driver's License	Yes	No	Located in:	_

Organ Donor Cards Other	Yes Yes	No O	Located in: Located in:
My Financial Infor	mation:		
Bank Account Info:			
Account Type: Cl Name of Bank:	hequing	Savings	Other 🗌
Branch:		Phone Num	iber:
ls this a joint account	? Yes No) If yes who is	is it joint with?
Account Type: Cl Name of Bank:	hequing	Savings	Other
Branch:		Phone Num	ıber:
ls this a joint account	? Yes No	If yes who is	is it joint with?
Account Type: Cl Name of Bank:	hequing	Savings	Other
Branch:		Phone Num	ıber:
ls this a joint account	? Yes No	If yes who is	is it joint with?
Safe Deposit Boxes:			
Name of Bank:	Phone	e Number:	
Name of Bank:	Phone	e Number:	

Loans/Lines of Credit/Mortgages:

Loan Type: Loan Line of Credit Mc Financial Institution:	Phone Number
Loan Type: Loan Line of Credit Mc Financial Institution:	ortgage Other Other Phone Number:
Loan Type: Loan Line of Credit Mc Financial Institution:	ortgage Other Other Phone Number:
Investments:	
Example investments: RRSP, TFSA, RESP, St	ocks, Bonds, etc.
Investment Type:	Financial Advisor:
Financial Institution:	Phone Number:
Investment Type:	Financial Advisor:
Financial Institution:	Phone Number:
Investment Type:	Financial Advisor:
Financial Institution:	Phone Number:
Investment Type:	Financial Advisor:
Financial Institution:	Phone Number:



Insurance:

Type: Auto Life Life Insurance Company:	House Health Other Phone Number:	
Policy #:	Located In:	
Type: Auto Life Life Insurance Company:	House Health Other Phone Number:	
Policy #:	Located In:	
Type: Auto Life Life Insurance Company:	House Health Other Health Phone Number:	
Policy #:	Located In:	
Type: Auto Life Life Insurance Company:	House Health Other Phone Number:	
Policy #:	Located In:	
Type: Auto Life Life Insurance Company:	House Health Other Phone Number:	
Policy #:	Located In:	
	3. A.L. 3 .	



Pensions:

Example Pensions: CPP, OAS, WSIB Benefits, OMERS, Teacher's Pension, occupational pensions, etc.

Pension Type:	Financial Advisor:
Financial Institution:	Phone Number:
Pension Type:	Financial Advisor:
Financial Institution:	Phone Number:
Pension Type:	Financial Advisor:
Financial Institution:	Phone Number:
Pension Type:	Financial Advisor:
Financial Institution:	Phone Number:
Credit Cards: Credit Card Type: VISA Master Card Other Located in:	AMEX (gas cards, department store credit cards,
Credit Card Type: VISA Master Card Other Located in:	AMEX (gas cards, department store credit cards,
Credit Card Type : VISA Master Card Other Located in:	AMEX (gas cards, department store credit cards,

Credit Card Type: VISA Master Card	
Other 🖵	(gas cards, department store credit cards,
etc.)	
Located in:	
Credit Card Type: VISA Master Card	
Other 🛄	(gas cards, department store credit cards,
etc.)	
Located in:	

Additional Financial Information:





IMPORTANT CONTACT INFORMATION

First Nation Band Office:	Phone Numb	Phone Number:		
Lands Manager:				
Is there someone who assists with Est	ates in my community?	Yes	No	
lf yes, Name:	Phone Number:			
Does my community have any Estate r	elated policies?	Yes	No	
If yes, where can I obtain a copy:				
Band Manager:	Phone Numb	er:		
Public Works Coordinator:	Phone Numb	er:		
Membership Clerk:	Phone Numb	er:		
First Nation Health Centre:	Phone Numb	er:		
Cemetery:	Phone Numb	er:		
Ontario Works Office:	Phone Numb	er:		

Additional Contact Information:

HELPFUL LINKS

To access some of these helpful links, take a picture of the QR codes with your smart phone and the link to the appropriate site will appear for you to click on.



Beausoleil First Nation Lands & Resources Dept. Phone : (705) 247-2051 | Fax : (705) 247-2239 http://www.chimnissing.ca/lands.html



Beausoleil First Nation Social Services & Ontario Works Dept. Phone : (705) 247-1180 | Fax : (705) 247-1179 http://www.chimnissing.ca/



Ontario Aboriginal Lands Association (OALA) Estates Unit https://oala-on.ca/about-oala/estates-unit/



Indigenous Services Canada – Estate Services for First Nations https://www.sac-isc.gc.ca/eng/1100100032357/1581866877231



National Aboriginal Lands Managers Association (NALMA) https://nalma.ca/



Canadian Mental Health Association – Understanding & **Coping with Loss and Grief**

https://ontario.cmha.ca/documents/understanding-and-copingwith-loss-and-grief/



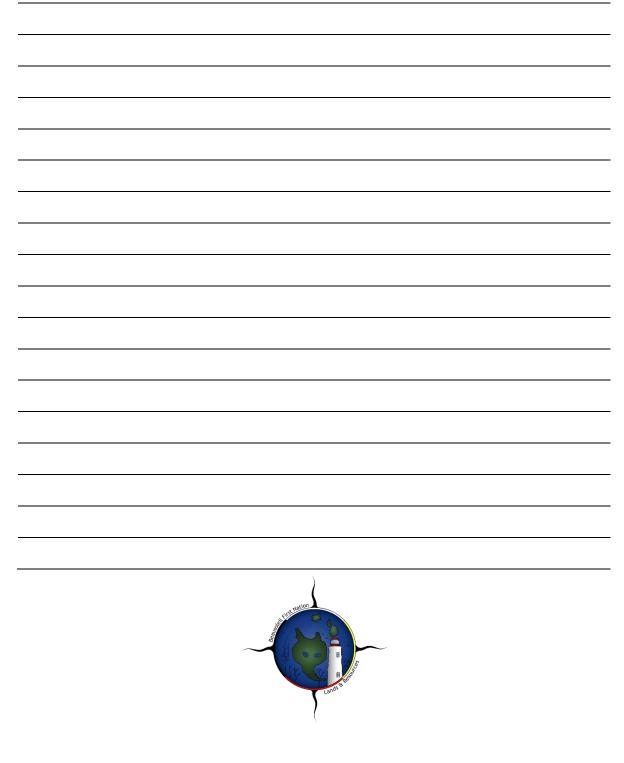
Ontario Works Directives – Funeral and Burials https://www.mcss.gov.on.ca/en/mcss/programs/social/directives/ ow/7 2 OW Directives.aspx



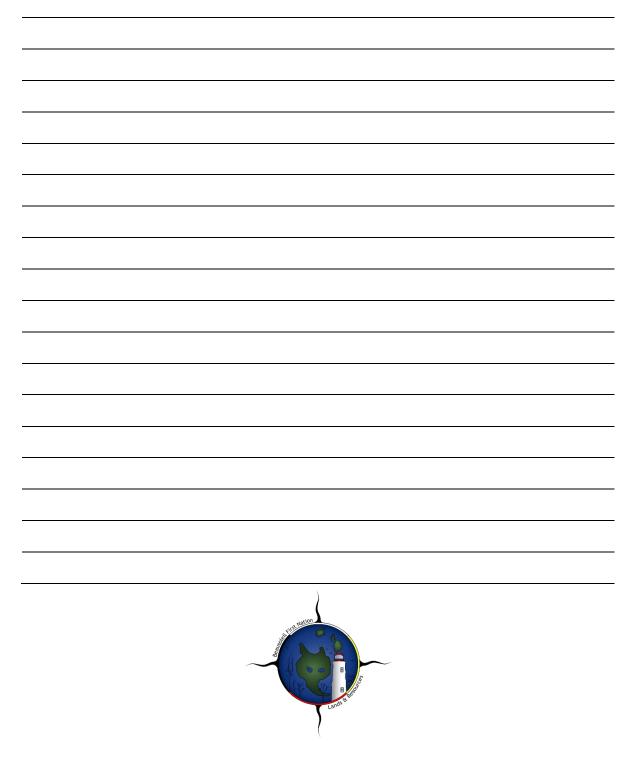
Legal Aid Ontario – Find a Legal Clinic http://www.legalaid.on.ca/legal-clinics/



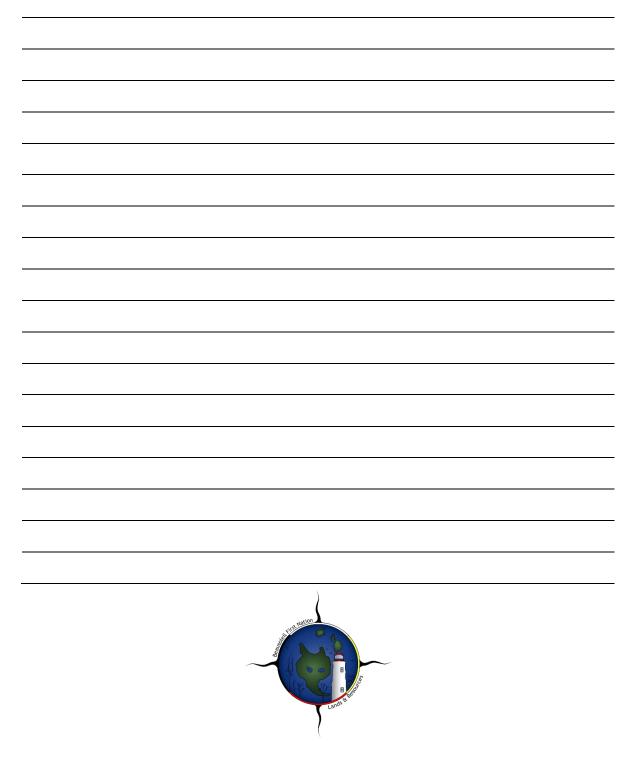
Government of Canada https://www.canada.ca/en.html **Notes:** (E.g., Social Media Credentials, Cellphone, Service Providers, i.e., Passcodes, Usernames, Account Info.)



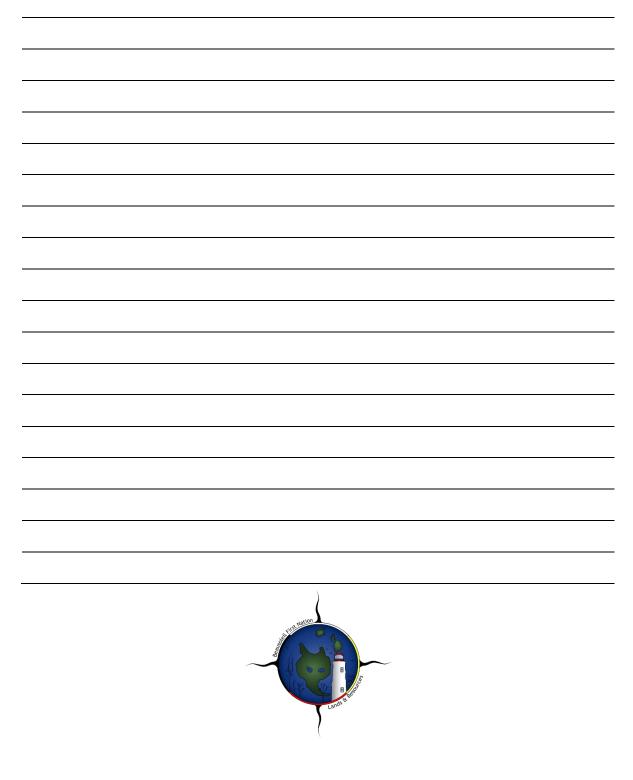
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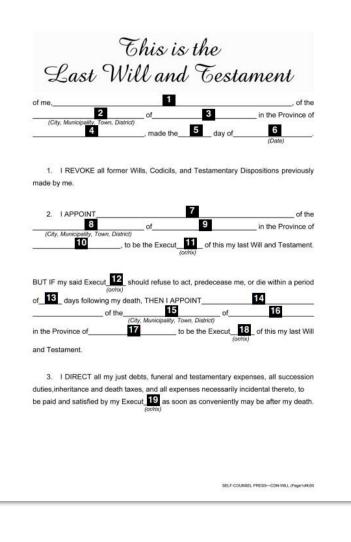
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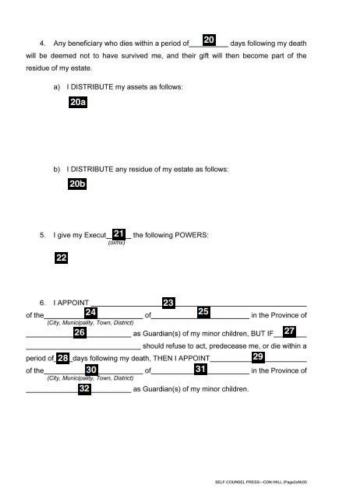
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INSTRUCTIONS FOR WILL KIT



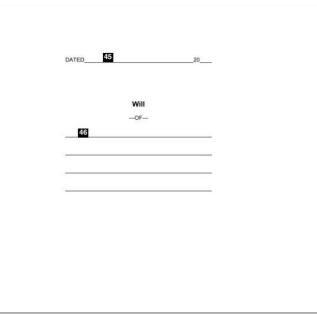
- **1.** Fill in your first and last name.
- **2.** Choose one of city, municipality, town, or district.
- **3.** State city, municipality, town, or district in which you reside.
- **4.** State province in which you reside.
- 5. State the day of the month on which you are making your will.
- **6.** State the month and the year in which you are making your will.
- **7.** Fill in the first and last name of your chosen executor/trix.
- **8.** Choose one of city, municipality, town, or district.
- **9.** State city, municipality, town, or district in which your executor/trix resides.
- **10.** State province in which your executor/trix resides.
- **11.** Choose one of executor or executrix.
- **12.** Choose one of executor or executrix.
- **13.** State number of days (usually 30) within which executor/trix's death will trigger designation of alternate executor/trix.
- **14.** Fill in the first and last name of your chosen alternate executor/trix.
- **15.** Choose one of city, municipality, town, or district.
- **16.** State city, municipality, town, or district in which your alternate executor/trix resides.
- **17.** State province in which your alternate executor/trix resides.
- **18.** Choose one of executor or executrix.
- **19.** Choose one of executor or executrix.



- **20.** State number of days (usually 30) following your death a beneficiary must live to be deemed to have survived you.
 - a. Set out the distribution of your assets.
 - b. Set out the distribution of the residue of your estate.
- **21.** Choose one of executor or executrix.
- **22.** Set out the powers given to your executor/trix.
- **23.** Fill in the first and last name of your chosen guardian(s).
- **24.** Choose one of city, municipality, town, or district.
- **25.** State city, municipality, town, or district in which your guardian(s) reside(s).
- **26.** State province in which your guardian(s) reside(s).
- **27.** Fill in the first and last name of your chosen guardian(s).
- **28.** State number of days within which guardian's death will trigger designation of alternate guardian.
- **29.** Fill in the first and last name of your chosen alternate guardian(s).
- **30.** Choose one of city, municipality, town, or district.
- **31.** State city, municipality, town, or district in which your alternate guardian(s) reside(s).
- **32.** State province in which your alternate guardian(s) reside(s)

Image: spage was signed and the preceding pages were initialled (Signature) Image: spage was signed and the preceding pages were initialled y the Testat	I request t	that my Guardians:	
(Signature)	33		
Image was signed and the preceding pages were initialled with the trest at a signature initially and published and declared as and for a signature in the presence of us both (nishter) Image was signed and the preceding pages were initialled or the trest in the presence of us both (nishter) Image was signed and the preceding pages were initialled or the same time who at a signature in the presence of (nishter) equest and in38 presence and in the presence of (nishter) equest and in38 presence and in the presence of (nishter) ach other have hereunto subscribed our names as witnesses: Name(Signature) uddress40 uddress43			
Inis page was signed and the preceding pages were initialled by the Testat35 and published and declared as and for (2000); 3.3. 3.3. Last Will and Testament in the presence of us both (niswher) equest and in383 presence and in the presence of (niswher) equest and in383 presence and in the presence of (niswher) each other have hereunto subscribed our names as witnesses: Name			
This page was signed and the preceding pages were initialled by the Testat 35 and published and declared as and for 36 is at Will and Testament in the presence of us both present together at the same time who at 37 (risher) equest and in 38 presence and in the presence of (risher) equest and in 38 (risher) equest and in 49 (risher) equest and in 49 (ris			
		227 0 75 757770 0	2 0.2 20
This page was signed and the preceding pages were initialled by the Testat 35 and published and declared as and for 36 (arbit) last Will and Testament in the presence of us both present together at the same time who at 37 (nisher) request and in 33 presence and in the presence of each other have hereunto subscribed our names as witnesses: Name 39 (Signature) Address 40 Occupation 41 Name 42 (Signature) Address 43	N WITNESS when	reof I have set my hand the day and yea	ar first above written.
(aritin) (aritin) [(aritin) [(misher)] present together at the same time who at 37 ((misher)] request and in 33 presence and in the presence of ((misher)] each other have hereunto subscribed our names as witnesses: Name 39 ((Signature)) Address 40 ((Signature)) Address 43		3 <u>0</u>	(Signature)
by the Testat 35 and published and declared as and for (orivit) and Testament in the presence of us both (marker) present together at the same time who at 37 (hisher) request and in 33 presence and in the presence of (nisher) each other have hereunto subscribed our names as witnesses: Name 39 (Signature) Address 40 (Signature) Name 42 (Signature) Address 43			
(aritin) (aritin) [(aritin) [(misher)] present together at the same time who at 37 ((misher)] request and in 33 presence and in the presence of ((misher)] each other have hereunto subscribed our names as witnesses: Name 39 ((Signature)) Address 40 ((Signature)) Address 43	This page was sigr	ned and the preceding pages were initial	led
36			for
present together at the same time who at <u>37</u> (his/her) request and in <u>53</u> presence and in the presence of (his/her) each other have hereunto subscribed our names as witnesses: Name_ <u>39</u> (Signature) Address <u>40</u> Occupation <u>41</u> Name_ <u>42</u> (Signature) Address <u>43</u>	36 last Will		oth
(his/her) request and in presence and in the presence of (his/her) each other have hereunto subscribed our names as witnesses: Name		t the same time who at 37	
(Risher) each other have hereunto subscribed our names as witnesses: Name		(his/her)	
39 (Signature) Address 40 Occupation 41 Name 42 (Signature) (Signature) Address 43	equest and in(his/har)	e of
(Signature) Address 40 Occupation 41 Name 42 (Signature) (Signature) Address 43	each other have he	reunto subscribed our names as witness	85:
(Signature) Address 40 Occupation 41 Name 42 (Signature) 43			
(Signature) Address 40 Occupation 41 Name 42 (Signature) Address 43	Name	39	
Address 43		(Signature)	
Name	Address		
(Signature) Address 43	Occupation_		
Address 43			
Address	Name	(Signature)	
Occupation 44	Address 43	131 3 050000	
19 AND 19 19 19 19 19 19 19 19 19 19 19 19 19	Occupation 4	4	23 34

- **33.** Set out your requests of your guardian(s).
- **34.** Sign your name in the presence of witnesses.
- **35.** Choose one of testator or testatrix.
- **36.** Choose one of his or her.
- **37.** Choose one of his or her.
- **38.** Choose one of his or her.
- **39.** Witness must sign in the presence of testator and other witness.
- 40. Address of witness.
- **41.** Occupation of witness.
- **42.** Witness must sign in the presence of testator and other witness.
- 43. Address of witness.
- **44.** Occupation of witness.



- **45.** Fill in the day, month, and year of when the will was completed.
- **46.** Fill in your first and last name.

This is the	
Last Will and Testame	nt

of me,			, of the
(City Municipality.	of Town, District)		in the Province of
			of (Date)
1. I REVOKE a	all former Wills, Codicil	s, and Testamentar	y Dispositions previously
made by me.			
2. I APPOINT_			of the
			in the Province of
(City, Municipality, To		ut of this my	y last Will and Testament.
BUT IF my said Exec	cut should refuse (or/rix)	e to act, predecease	me, or die within a period
of	days following my	death, THEN I A	APPOINT
	of the (City, Municipal	of ity, Town, District)	
in the Province of		to be the Execut_	of this my last Will
and Testament.			

3. I DIRECT all my just debts, funeral and testamentary expenses, all succession duties, inheritance and death taxes, and all expenses necessarily incidental thereto, to be paid and satisfied by my Execut_____ as soon as conveniently may be after my death.

(or/rix)

4. Any beneficiary who dies within a period of ______ days following my death will be deemed not to have survived me, and their gift will then become part of the residue of my estate.

- a) I DISTRIBUTE my assets as follows:
- b) I DISTRIBUTE any residue of my estate as follows:
- 5. I give my Execut_____ the following POWERS:
- 6

APPOINT

of the	of	in the Province of
(City	y, Municipality, Town, District)	
	as Guardian(s) of my minor	children, BUT IF
	should refuse to act, pr	edecease me, or die within a
period of	days following my death, THEN I APPOINT	of
the	of	in the Province of
(City	y, Municipality, Town, District)	
	as Guardian(s) of my minor	children.

.

I request that my Guardians:

IN WITNESS whereof I have set my hand the day and year first above written.

	(Signature)		
This page was signed and the preceding pages were initialled by the Testat and published and declared as and for			
last Will and Testament in the presence of us both (his/her)			
present together at the same time who at (his/her)			
request and in presence and in the presence of			
each other have hereunto subscribed our names as witnesses:			
Name (Signature)			
Address			
Occupation			
Name (Signature)			
Address			
Occupation			

DA	TED
20	

Will

__OF__



A family is like a circle. The connection never ends, and even if at times it breaks, in time it always mends.

A family is like the stars. Somehow, they're always there. Families are those who help, who support and always care.

- Nícole M O'Neal

Floral Design by: Neebinnaukzhik Southall

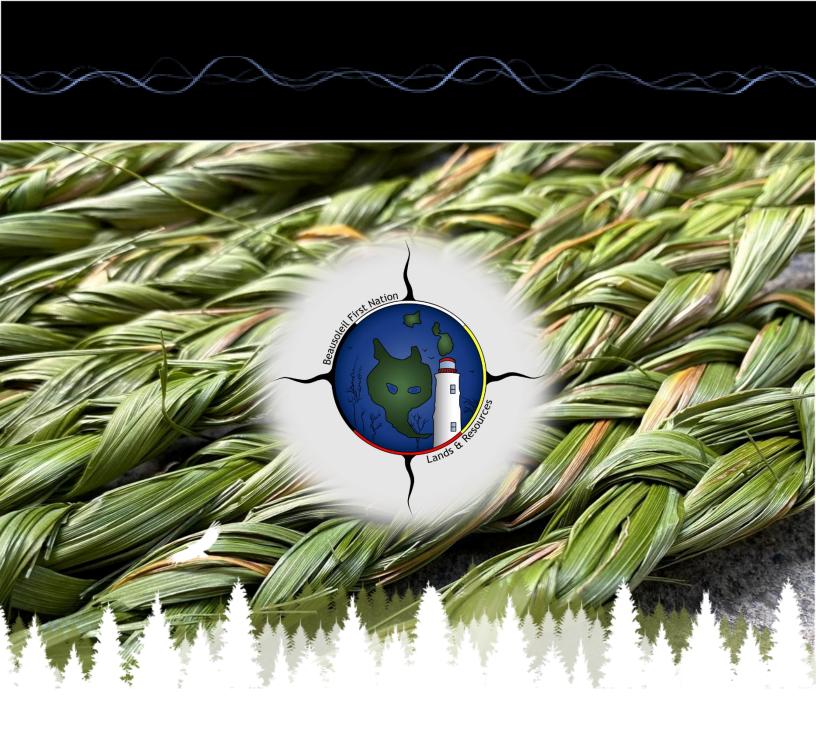




"Naanaa Gdaawendang"

"Thinking Ahead Carefully"





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