



Estate planning An annual check-up

Estate planning is not just needed by high-income earners; every parent, spouse, business owner or professional should have an estate plan. With a proper and current estate plan, you can dramatically reduce the added strain to your executor caused by the legal and financial issues surrounding the settling of an estate.

I can help to ensure your estate plan is up to date. The following check-list of changes could indicate that your plan needs some attention.

Name: _____

Date: _____

Yes No

- Have you moved?
- Have any of your bill-paying arrangements changed?
- Are there additional assets or liabilities that should be added?
- Have you recently had a child, been married, divorced or widowed?
- Are the appropriate papers stored safely?
- Should changes be made to your will?
- Are all original copies of important documents up to date, i.e., driver's license, etc.?

Yes No

- Have any new investments been made?
- Have any new insurance policies been purchased?
- Are all sources of income the same?
- Have any new bank accounts been opened?
- Have any new credit cards been obtained?
- Have you made any changes to your professional advisors?
- Have you changed your executor?
- Have funeral arrangements been changed?

Sometimes, keeping your estate plan current seems almost as cumbersome as making these changes in the first place. I can help.

Our estate planning materials provide excellent tools to help you prepare a comprehensive estate plan.

When changes are necessary, we can ensure your plan is current and continues to meet your needs.

At Canada Life, we know that personal service and professional guidance is the key to helping you make informed decisions to find the right solution for your needs. We are committed to providing the highest quality service, backed by our history of strength and stability.

Helping people achieve more

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