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## PLANNED GIVING

Every day, people are helped and lives are enriched by the work of registered charities and foundations, and other not-for-profit organizations in our communities. Financial assistance is essential to support and sustain charitable work. Many people generously give their money, time, and energy to their local not-for-profit organizations and are unaware that by leaving a gift in their will or estate plan to the charitable groups of their choice, they can continue to help people in need or promote a favourite cause.

Surprisingly, a gift can also be a very practical addition to a financial or estate plan when tax issues are taken into consideration – even for those who think they may not have tax issues. In most cases, the tax burden left to relatives is lifted significantly. Your financial advisor can provide guidance on how giving may actually benefit your family after you're gone.

By leaving a gift in your memory, you are making a significant contribution to the future sustainability of those charitable and not-for-profit organizations that you value most.

### Things You Can Do Today to Leave a Legacy of Life

- Prepare a will
- Choose your charity
- Name an alternate beneficiary
- Consider memorial gifts
- Ask your legal or financial advisor for advice

Contact **Sage Seniors Association** to discuss this giving option.  
Phone: 780.701.9012  
Email: [nsmith@MySage.ca](mailto:nsmith@MySage.ca)

## Building success.

Our fund at Edmonton Community Foundation (ECF) enables us to contribute to building success in our community. The fund encourages our children to demonstrate our values of sharing and appreciation for our own good fortune.

*Thank you ECF!*

*Haggie & John Mitchell*



*Give. Grow. Transform.*

Call 780-426-0015 or visit our website [www.ecfoundation.org](http://www.ecfoundation.org)



## Sage Seniors Association

Sage delivers several social programs for at-risk and vulnerable seniors. These programs are made possible in part due to gifts made in people's estates. Please consider Sage and seniors in need when contemplating your gift planning. [www.mysage.ca/supporting-sage/donate/planned-giving](http://www.mysage.ca/supporting-sage/donate/planned-giving)

## Edmonton Community Foundation

Contact: Donor Services  
9910 103 St. NW T5K 2V7  
Phone: 780.426.0015  
Email: [info@ecfoundation.org](mailto:info@ecfoundation.org)  
[www.ecfoundation.org](http://www.ecfoundation.org)

- Edmonton Community Foundation (ECF) can help you transform your dreams of helping others into reality.
- ECF invests donations and uses the interest to create legacies that support the arts and health, community and social services, education and learning, recreation and leisure, and the environment.
- Funds can be created now, over time, or through will bequests.

## University Hospital Foundation

1H1.91 WMC 8440 112 St. NW T6G 2B7  
Phone: 780.407.7007  
Email: [uhfoundation@ahs.ca](mailto:uhfoundation@ahs.ca)  
[www.GiveToUHF.ca](http://www.GiveToUHF.ca)

- The University Hospital Foundation believes every donation has the power to make a difference. Through your generous support you play a pivotal role on the health care team.
- We ask for your generosity to ensure that our patients have access to the highest level of care – the best and brightest minds, leading edge technology and the latest research – when they need it most.
- For more information, please visit: [www.GivetoUHF.ca](http://www.GivetoUHF.ca)

## Leave a legacy of care

A gift in your Will to the University Hospital Foundation will help care for people in your community and beyond – for generations to come.



To learn more please contact Judith Morrison  
780.407.7490 or [Judith.Morrison@ahs.ca](mailto:Judith.Morrison@ahs.ca)

[www.GivetoUHF.ca](http://www.GivetoUHF.ca)



Supporting innovation  
and excellence at the

University of Alberta Hospital  
Mazankowski Alberta Heart Institute  
Kaye Edmonton Clinic

## WHAT TO DO WHEN SOMEONE DIES: A CHECK LIST

When someone dies there are a number of agencies, businesses, and government departments you may need to contact to let them know the person is deceased. Even if the deceased person was considered to be low income, many of the following resources need to be contacted and informed of the date of death.

### Who should do the work?

- Are you the legal representative? Yes if:
  - You are named as the executor in the will;
  - You are appointed as the administrator of the estate by a court; or
  - You are the liquidator for an estate in Québec;
- If you are not a legal representative, the responsibility goes to a surviving family member, in order of priority:
  - spouse, child, child's parent, sibling, grandchild, nephew or niece, other relative solely remaining after deceased.

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Email: [tctransitions@shaw.ca](mailto:tctransitions@shaw.ca)

<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Estate Assistance</li> <li><input checked="" type="checkbox"/> Home Organization Cleaning, Sorting &amp; Organizing, Recycling &amp; Disposing of unwanted items.</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Home Maintenance</li> <li><input checked="" type="checkbox"/> Relocation: Assistance looking for, moving to, settling in a new residence.</li> </ul>
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**Deborah McCarthy**  
Relocation & Home Organization Specialist


(780)  
419-4673

### Who to contact AFTER someone dies

#### INCOME TAX

What should you do first?

- Inform **Canada Revenue Agency (CRA)** of a death at 1.800.959.8281
  - More information is available on the CRA website [www.cra.gc.ca](http://www.cra.gc.ca) and the guide RC4111, What to Do Following a Death
- Arrangements must be made with CRA if the deceased was receiving the following benefits: Goods and Services Tax Credit (GSTC); Canada Child Benefit (CCB) for a child; Working Income Tax Benefit (WITB) for a child.
  - Arrangements should be made with CRA to transfer benefits.
- The legal representative or surviving family member has responsibilities under the Income Tax Act, and may need information from the deceased person's tax records. The information can be obtained by providing CRA with a copy of the deceased's death certificate, social insurance number and a complete copy of the will, or another legal document, such as a grant of probate or letters of administration showing that you are the legal representative. The legal representative's address is also needed for all correspondence with the tax service centre.
  - You may wish to appoint an authorized representative to deal with the CRA for tax matters on your behalf. You may do so by completing Form T1013, Authorizing or Cancelling a Representative.
- Death outside of Canada – contact the Canadian Consulate Office for assistance.

## PENSIONS

### Service Canada

CALL for service in English: 1.800.277.9914

- ❑ Inform Service Canada of a death to cancel Old Age Security (OAS) and/or Canada Pension Plan (CPP).
- ❑ Contact Service Canada at 1.800.622.6232 for information on Survivor and Death benefits. Link to What to do following a Death at: [www.servicecanada.gc.ca/eng/lifeevents/loss.shtml](http://www.servicecanada.gc.ca/eng/lifeevents/loss.shtml)

See SENIORS' INFORMATION SERVICES - Consumer Resources for complete listing.

### Alberta Seniors Benefit

10405 Jasper Ave. NW T5J 4R7

Phone: 780.644.9992

Toll Free: 1.877.644.9992

[www.seniors-housing.alberta.ca](http://www.seniors-housing.alberta.ca)

- ❑ Give the name and Personal Health Number of the deceased and the date of death. Benefits will be cancelled the month following the senior's passing.
- Publishes "Saying Farewell Handbook" - A guide to assist you with the death and dying process.

### Employment Insurance

Phone: 1.800.206.7218

After hearing the recorded message options, press Zero (0) to speak to a live operator during business hours. Business hours are 8:30 am - 4:30 pm local time.

- ❑ Give the deceased person's name, Social Insurance Number and four-digit Employment Insurance access code.

## VETERANS

### Veterans Affairs Canada

### Anciens Combattants Canada

Phone: 1.866.522.2122 (English)

Téléphone: 1.866.522.2022 (Français)

If the deceased was a Veteran and received benefits or support services, contact Veterans Affairs Canada. See [FINANCE-Federal Financial Programs & Benefits for complete listing](#).

Si la personne décédée était un ancien combattant qui touchait des prestations ou bénéficiait de services de soutien, communiquez avec ACC. Voir [FINANCE-Federal Financial Programs & Benefits pour obtenir les données d'ACC](#).

### Last Post Fund

Toll Free: 1.800.465.7113

Email: [info@lastpost.ca](mailto:info@lastpost.ca)

[www.lastpostfund.ca](http://www.lastpostfund.ca)

Some veterans may be eligible for assistance with funeral costs.

See [FINANCE-Federal Financial Programs & Benefits for complete listing](#).

## INSURANCE

- ❑ If you are not able to identify the source company of an insurance policy or cannot find the policy or policies of the deceased, the organization below may be able to assist in having a policy search conducted to locate any life insurance coverage that may have been misplaced over time.

### OmbudService for Life & Health Insurance (OLHI)

Toll Free: 1.888.295.8112

- OLHI assists any consumer who has a concern or complaint about a Canadian life and health insurance product or service

- OLHI provides general consumer information on life and health insurance products and services
- Under certain circumstances, OLHI may ask insurance companies to undertake a policy search for possible insurance coverages on a deceased's life.

See **SENIORS' INFORMATION SERVICES-Consumer Resources** for complete listing.

## Funeral Benefit

### Alberta Supports Contact Centre

Phone: 780.644.9992

Toll-free outside Edmonton: 1.877.644.9992

email: [hs.ascc@gov.ab.ca](mailto:hs.ascc@gov.ab.ca)

- Alberta's funeral benefit ensures deceased persons are given a proper burial or cremation when their estate or responsible survivors are unable to pay for funeral services.
- Approved funeral homes in Alberta offer these services. Contact the Alberta Supports Contact Centre to find out more about the funeral benefit and approved funeral homes.

## CREDIT CARDS

These should be cancelled with the credit card issuers and the cards should be destroyed (unless they are in the survivor's name as well).

## BANKS/SAFETY DEPOSIT BOXES

The executor and/or the survivor needs to notify the bank and arrange closing of accounts or updating of names on accounts.

The bank will require a copy of the will & the funeral director's death certificate.

If cheques were deposited directly into a bank account, the issuers may not have the correct address of the deceased and must be informed about the person's death.

## HEALTH

### Alberta Health

Mailing Address: PO Box 1360, Stn Main  
Edmonton AB T5J 2N3

Phone: 780.427.1432

Toll Free: outside Edmonton dial 310.0000,  
then 780.427.1432

Email: [health.ahcipmail@gov.ab.ca](mailto:health.ahcipmail@gov.ab.ca)  
[www.health.alberta.ca](http://www.health.alberta.ca)

- Notify Alberta Health when an individual on your Alberta Health Care Insurance Plan (AHCIP) account is deceased.
- Alberta Health will cancel the coverage for the deceased person and ensure AHCIP coverage remains in place for any surviving family members.

### Alberta Blue Cross Plan

10009 108 St. T5J 3C5

Phone: 780.498.8000

- If the survivor is over 65, a new card will be issued. If the survivor is under 65, he/she will pay a monthly fee to continue with the service if desired.

## HOME

If the deceased's name is on the title of property or a home contact:

### Land Titles

Phone: 780.427.2742

Email: [lto@gov.ab.ca](mailto:lto@gov.ab.ca)

[www.servicealberta.ca](http://www.servicealberta.ca)

- Have the name on the title changed.
- Obtain documentation to change a title.

See **HOUSING – Housing Resources & Helplines** for more information.

## TELEPHONE

If the survivor is a widow and feels it is necessary for her confidence or safety, the telephone may be retained in the husband's name or she may wish to use her initials.

**VEHICLE**

❑ If a vehicle was registered in the name of the deceased, contact the **Service Alberta Contact Centre** at 780.427.7013.

Parking placards may be cancelled at any Registries office.

❑ Ensure that the name of the deceased is removed from any car insurance policies by contacting the insurance company.

❑ The driver's license or identification card of the deceased should be taken to your local Registries agent, together with a copy of the death certificate or a Funeral Director's statement.

**ESTATE**

❑ The survivor should notify the executor who will arrange for the will to be processed.

❑ If probate is needed, the executor will arrange with a lawyer for this to be done, but the survivor should gather all the necessary papers/documents together including the will.

**DEATH CERTIFICATE**

❑ All of the above actions require proof of death. The funeral home will provide you with a free death certificate that will be acceptable in most circumstances.

**Work closely with the Executor, who may undertake most of these tasks.**

**FUNERAL SERVICES & CEMETERIES****Alberta Funeral Services Regulatory Board**

11810 Kingsway Ave. T5G 0X5

Phone: 780.452.6130

Email: [office@afsrb.ab.ca](mailto:office@afsrb.ab.ca)

- We provide information about funeral planning to the public. Call us for your free copy of the Funeral Planning in Alberta booklet.
- We investigate complaints about funeral services.
- Visit [www.AFSRB.ab.ca](http://www.AFSRB.ab.ca) for a complete list of all licensed funeral services businesses in Alberta

Leave a  
Legacy  
of Life

sage



For information on how your PLANNED GIVING can help us inspire and support seniors to be the best they can be:

Contact Sage 780.423.5510  
visit [www.mysage.ca](http://www.mysage.ca) and click on "Support Us"

**Connelly-McKinley Funeral Homes**

www.connelly-mckinley.com

**Downtown Location:**

10014 114 St. T5K 1R5

Phone: 780.422.2222

Hours of Operation:

Mon-Sat 8am-5pm, Sun 9am-5pm

Statutory Holidays 10am-4pm

**South Edmonton Location:**

4820 Meridian Street T6P 1R3

Phone 780.468.2222

Hours of Operation: Mon-Fri 9am-4:30pm

Saturday, Sunday and Statutory Holidays

by Appointment

**St. Albert Location:**

9 Muir Drive T8N 1G1

Phone 780.458.2222

Hours of Operation:

Mon-Fri 9am-5pm, Sat 10am-4pm

Sundays and Statutory Holidays by

Appointment

- All locations offer spacious Chapel and Reception Facilities
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9 Muir Drive, St. Albert, AB..... 780-458-2222

4820 Meridian Street, Edmonton, AB..... 780-468-2222

**www.connelly-mckinley.com**

## Dignity Memorial

### Hainstock's Funeral Home & Crematorium (South Location)

9810 34 Ave. T6E 6L1

Phone: 780.440.2999

[www.hainstockedmonton.com](http://www.hainstockedmonton.com)

Hours of Operation:

Mon-Fri 8:30am-5pm, Sat 9am-5pm,

Sun & Holidays Noon-5pm.

24 hour telephone availability.

A Division of Service Corporation  
International ULC.

### Memories Funeral Home & Crematorium (North Location)

13403 St. Albert Trail

Edmonton AB T5L 4X1

Phone: 780.454.9111

[www.memoriesfuneral.com](http://www.memoriesfuneral.com)

Hours of Operation:

Mon-Fri 9am-5pm,

Sat-Sun & Holidays by appointment.

24 hour telephone availability.

- Both funeral homes offer full size chapels, crematoriums, reception facilities and off street parking.
- Whether pre-planning or services at the time of need, Dignity Memorial Funeral Homes serve all faiths and customs with compassion, creativity and honour with 100% satisfaction guarantee.

A Division of Service Corporation  
International ULC.

### First Memorial Funeral Services

10541 81 Ave. Edmonton AB T6E 1X7

Phone: 780.433.7335

11090 86 Ave.

Fort Saskatchewan AB T8L 4K6

Phone: 780.998.9898

[www.firstmemorialfuneral.com](http://www.firstmemorialfuneral.com)

Hours of Operation:

Funeral homes Mon-Fri 9am-5pm

24 hrs on call service

- Both funeral homes offer chapel and

reception facilities

- Whether pre-planning or services at the time of need, First Memorial continues the tradition of affordable, compassionate services
- Memorial Society of Edmonton members welcomed

A Division of Service Corporation  
International ULC.

## Evergreen Memorial Gardens

16102 Fort Rd. NW T5Y 6A2

Phone: 780.472.9007

Toll Free: 1.800.663.1820

Email: [bhatton@arbormemorial.com](mailto:bhatton@arbormemorial.com)

[www.evergreenmemorial.com](http://www.evergreenmemorial.com)

- With a funeral home and cemetery at one location, your planning process becomes easier. There is no need for a long procession between facilities, so your family and guests have more quality time to connect. Plan today.

## CONNECTING EDMONTON SENIORS

### Am I at risk of social isolation?

- I am content with my friendships and relationships
- I have enough people I feel comfortable asking for help at any time
- I am as socially and physically active as I want to be
- I have the resources I need to do the things I want to do

If you answered "No" to any of these questions, you may be at risk of social isolation.

For more information, go to:  
[www.connectingedmontonseniors.ca](http://www.connectingedmontonseniors.ca)





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*As Dignity Memorial providers, we offer a variety of choices for your final needs. Serving all faiths and cultures in your community.*

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**LIFE WELL CELEBRATED**

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Edmonton, Alberta T5L 4X1  
780-454-9111  
[www.memoriesfuneral.com](http://www.memoriesfuneral.com)

**First Memorial Funeral Services – Harmony Chapel**

10541 – 81 Avenue  
Edmonton, Alberta T6E 1X7  
780-433-7335  
[www.firstmemorialfuneral.com](http://www.firstmemorialfuneral.com)

**Hainstock's Funeral Home & Crematorium**

9810 34 Avenue  
Edmonton, Alberta T6E 6L1  
780-440-2999  
[www.hainstockedmonton.com](http://www.hainstockedmonton.com)

**A Division of Service Corporation International ULC.**

**Or Call 1-800-34-DIGNITY (3-446489) for Information**

When you choose a Dignity Memorial Funeral Home, you will receive access to many exclusive benefits not available to individual sites.

**• National Transferability of Prearranged Services**

Your prearranged funeral services are fully transferable and will be honoured by any Dignity Memorial provider throughout North America.

**• Estate Fraud Protection**

In order to protect against identity theft, this protection plan notifies key organizations that a loved one has died and ensure the necessary information is communicated quickly.

**• Acclaimed Grief Management Library**

To those coping with a loss, an extensive collection of booklets, DVDs and CDs offers professional advice and compassionate insight.

**• A Complimentary Personal Planning Guide**

## The Memorial Society of Edmonton & District

1108 (Bsmnt.) - 10235 124 St. NW T5N 1P9  
Phone: 780.944.0196

Email:

info@memorialsocietyedmonton.ca

www.memorialsocietyedmonton.ca

Hours of Operation:

Tues, Thurs, Fri 10am–3pm

- Concerned about funeral costs? Find out how you can save money and gain peace of mind with membership in the Memorial Society.

## Park Memorial Funeral Home & Crematorium

9709 111 Ave. T5G 0B2

Phone: 780.426.0050

Email: info@parkmemorial.com

www.parkmemorial.com

Hours of Operation:

Mon-Fri 8:30am–9pm,

Sat 8:30am–5pm, Sun 12pm–9pm

- Park Memorial proudly serves all faiths and customs, offering a full range of services and products, specializing in both highly personalized and traditional services.
- For your family's convenience, Park Memorial has an on-site chapel, crematorium, reception centre and pre-arrangement facilities.

## BEREAVEMENT SUPPORT

### Suicide Crisis Support Services Canadian Mental Health Association - Edmonton Region

### Suicide Bereavement Support Services 780.414.6300

Provides support to anyone who is grieving a loss to suicide. Services include support groups for adults who have experienced loss to suicide. Debriefings are also provided for schools, agencies, community groups or businesses after a suicide.

### Suicide Caregiver Support Services

See HEALTH & WELLBEING – Caregiver Support

### Stony Plain Family & Community Support Services & Volunteer Centre

Forest Green Plaza, 107-4613 52 Ave

Phone: 780.963.8583

Email: pfcss@stonyplain.com

www.stonyplain.com/fcss

- The mandate of FCSS is to provide locally-driven, preventative, social initiatives to enhance the wellbeing of individuals, families and the community.
- Caring Friends is a confidential and informal (drop in) bereavement support group led by trained bereavement counsellors.



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**24 Hours:** 780-426-0050

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- Support for seniors looking for safe and affordable housing
- People who are dealing with the effects of hoarding behaviours
- Students who are learning to work with seniors and older adults
- Seniors seeking refuge from elder abuse
- English language learning for immigrant, refugee, and newcomer seniors
- Income tax preparation for low-income seniors
- Help with filling out government forms
- A welcoming space for seniors to stay mentally, physically, and socially active
- Outreach to lonely, isolated and vulnerable seniors

 To donate, complete the section below and send it to 15 Sir Winston Churchill Square, Edmonton, AB T5J 2E5

## YES! I want to support seniors.

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Name

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Address

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City Province Postal Code

- Please contact me about a gift of **stocks, securities, or bequest.**
- Please send me email updates about Sage.

.....  
Email



[www.mysage.ca](http://www.mysage.ca)

Charitable Registration No. 11915 4839 RRR0001

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 quarterly  annual  
 donation in the amount of:  
 20.00  100.00  500.00  
 50.00  250.00  1000.00  
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- Credit Card
- Card No. ....
- Expiry Date .....
- Amount .....