

Chapter Contents

- Planned Giving
- What To Do When Someone Dies
- Funeral Services & Cemeteries
- Bereavement Support

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

Responsible stewardship.

We are comforted knowing our endowment with Edmonton Community Foundation is professionally managed. The proceeds will always be directed to specific causes we have identified.

This is important to our family.

Salma & Dr. Zaheer Lakhani



Give. Grow. Transform.

Call 780-426-0015 or visit our website www.ecfoundation.org

**EDMONTON
COMMUNITY
FOUNDATION**

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

Edmonton Community Foundation

Contact: Donor Services
9910 103 St. NW T5K 2V7
Phone: 780.426.0015
Email: info@ecfoundation.org
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

www.universityhospitalfoundation.ab.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.universityhospitalfoundation.ab.ca

Leave a legacy of care

Make a decision today to change lives tomorrow. Through a gift in your will, you can help advance patient care, innovation and research for generations to come.

To learn more about supporting the University Hospital Foundation, contact Jeremiah Woods at 780.407.7490 or jeremiah.woods@ahs.ca.

GivetoUHF.ca



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.

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 canada.ca/taxes-deceased. Information Sheet RC4111, What to Do Following a Death

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.

TLC Transitions

Estate, Home Org
& Relocation
assistance



780 419-4673

tlctransitions@shaw.ca

Centaur Moving & Deliveries



780 220-6684

steve@centaurmoving.net

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

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.alberta.ca/ministry-seniors-housing.aspx

- 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

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

Phone: 780-638-4443

Toll-free outside Edmonton: 1-855-638-4443

email: CSS.FuneralBenefits@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 deceased person'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

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

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

180, 2755 Broadmoor Blvd

Sherwood Park, T8H 2W7

Phone: 780.452.6130

Email: office@afsrab.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 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 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 1R6

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
- Convenient Parking
- Crematorium on site (Edm South)
- Serving All Faiths
- Unique, affordable service options
- Customized Prearrangement Plans
- Comprehensive Aftercare Services
- Repatriation Plans for Travellers
- Committed to serving families with exceptional service and attention to every detail
- 100% Service Guarantee



Connelly-McKinley Funeral Home Reception Center & Crematorium

Proudly Family Owned & Serving the Community Since 1908

24 hrs 780-422-2222

*Serving All Faiths *100% Service Guarantee *Funeral Director's Assistance 24 hours/day

*Complete Personalized Funeral & Cremation Arrangements in our Offices or Your Home

*Away From Home Travel Protection *Professional Aftercare Consultants

*Concierge Services for Out of Town Guests

**CALL TODAY FOR A PERSONAL NO COST, NO OBLIGATION PERSONAL CONSULTATION
TO RECEIVE OUR EMERGENCY GRAB n' GO KIT AND OUR PERSONAL PLANNING ORGANIZER**

Committed to the Highest Standard of Service & Care

THREE CONVENIENT LOCATIONS TO SERVE YOU

10011 - 114 Street, Edmonton, AB..... 780-422-2222

9 Muir Drive, St. Albert, AB..... 780-458-2222

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

www.connelly-mckinley.com

Evergreen Memorial Gardens

16102 Fort Rd. NW T5Y 6A2

Phone: 780.472.9007

Toll Free: 1.800.663.1820

Email: bhatton@arbormemorial.com

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.

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:

Call for office hours information

- The memorial Society of Edmonton and District, founded in 1957, is a non-profit, non-sectarian society of like-minded individuals from all walks of life who believe in preplanning dignified final arrangements at a reasonable cost.

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

- Our family owned and operated funeral home 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.



Park Memorial Ltd.
Funeral Home & Crematorium

A Family Owned & Operated Funeral Home Since 1941

Licensed Funeral Directors and Embalmers

Edmonton: 9709 – 111 Avenue

24 Hours: 780-426-0050

Toll Free: 1-877-426-0050



Funerals & Pre-arrangements

Whether preplanning for peace of mind or celebrating the life of your loved one, we are honored to assist in your time of need.

Visit us online: www.parkmemorial.com • Visit us in person: Edmonton | Lamont | Mayerthorpe | Smoky Lake | Vegreville

When it comes to cemetery services, you have options.

City of Edmonton Municipal Cemeteries offer a variety of products and services — from traditional and garden burials, to cremation and tributes. Our seven picturesque municipal cemeteries serve to honour you and your loved ones in a peaceful, protected environment.

It's never too early to make arrangements. Explore your options at edmonton.ca/cemeteries or contact us at 780.442.0974 cemetery@edmonton.ca

**Municipal
Cemeteries**

Edmonton

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.

See also **SENIORS' INFORMATION SERVICES**
– Seniors' Services Organizations

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.