

### Chapter Contents

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

## PLANNED GIVING

Every day, lives are enriched by the work of registered charities, foundations, and other not-for-profit organizations in our communities. Financial assistance is essential to support and sustain their charitable work. By leaving a gift in your will or estate plan to the charitable groups of your choice, you can have a positive impact on a favourite cause.

A financial gift can also be a very practical addition to a financial or estate plan when tax issues are taken into consideration. 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.

### 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

### 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](http://www.mysage.ca/supporting-sage)  
Contact **Sage Seniors Association** to discuss this giving option.  
Phone: 780.701.9012  
Email: [nsmith@MySage.ca](mailto:nsmith@MySage.ca)



At IG Wealth Management, we believe in retirement planning that goes beyond RRSPs. With an IG Living Plan™ your retirement goals are synchronized with your whole financial picture.



**Let's review your retirement goals today.**

BRENDA ARCAND CFP®/RRC  
Financial Consultant  
Investors Group Financial Services Inc.  
Tel. (780) 449-1487  
[Brenda.Arcand@IG.ca](mailto:Brenda.Arcand@IG.ca)

Trademarks, including IG Wealth Management, are owned by IGM Financial Inc. and licensed to its subsidiary corporations.  
© Investors Group Inc. 2019. MP2107 (1/2019)

## Investors Group Financial Services Inc. Brenda Arcand CFP, RRC

#107, 101 Broadway Blvd

**Sherwood Park** T8H 2A8

Phone: 780.449.1487 ext 5281

Email: [Brenda.arcand@ig.ca](mailto:Brenda.arcand@ig.ca)

[https://advisor.investorsgroup.com/en/brenda\\_arcand](https://advisor.investorsgroup.com/en/brenda_arcand)

- True financial well-being means living life on your own terms. Getting there requires a financial plan that evolves with your ever-changing needs and goals, which is why we've developed the IG Living Plan™. This holistic plan considers your full financial life and looks at whether you're saving enough, spending wisely, properly protecting yourself from the unexpected, while always considering how to maximize your tax efficiency along the way. Our goal? To improve your financial well-being and make sure you can embrace all of life's possibilities.
- Establish a well-constructed estate plan, tailored to your needs, that allows your legacy to endure by supporting the causes important to you.

Trademarks, including IG Wealth Management, are owned by IGM Financial Inc. and licensed to its subsidiary corporations.

## 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, 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.



arts, culture & heritage education learning health & wellness  
social & community services recreation & leisure environment  
social enterprise endowment charitable legacy  
investment grants impact community  
fund granting field engaged unique in  
perpetuity timeless generation forever

Joanne Berger

**Lasting continuity.**

**Our family has been fortunate to benefit from all that Edmonton has to offer.** Through Edmonton Community Foundation, the Berger Family Fund contributes to new community needs as they arise.

***This helps maintain and strengthen Edmonton now and into the future.***

**Give. Grow. Transform.**

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

**EDMONTON  
COMMUNITY  
FOUNDATION**

## 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

### Canada Revenue Agency (CRA)

Inform the CRA of a death at 1.800.959.8281

- More information is available on the CRA website [canada.ca/taxesdeceased](http://canada.ca/taxesdeceased): 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 Canceling a Representative.
  - Death outside of Canada – contact the Canadian Consulate Office for assistance.

## PENSIONS

### Service Canada

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

Toll-Free: 1.800.622.6232 for information on Survivor and Death benefits. Link to [www.servicecanada.gc.ca/eng/lifeevents/loss](http://www.servicecanada.gc.ca/eng/lifeevents/loss).

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

### Alberta Seniors Benefit

Phone: 780.644.9992

Toll-Free: 1.877.644.9992

[www.alberta.ca](http://www.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 available online at [www.alberta.ca/open-governmentprogram](http://www.alberta.ca/open-governmentprogram).

### Employment Insurance

Toll-Free: 1.800.206.7218

The EI Telephone Information Service is an automated telephone service that is available 24/7

If you would prefer to speak to a representative, call 1.800.206.7218 between 8:30am and 4:30pm, Monday to Friday, and press "0." You can get general information about the EI program, the Social Insurance Number (SIN), and your specific EI claim.

- 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 **FINANCEFederal**

**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 OLHI 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: 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 and 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: 310.0000, then 780.427.1432

Email: health.ahcipmail@gov.ab.ca

[www.alberta.ca/health.aspx](http://www.alberta.ca/health.aspx)

- 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. NW 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.alberta.ca/land-titles.aspx](http://www.alberta.ca/land-titles.aspx)

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

See [HOUSING – Housing Resources & Helplines](#) for more information.

## VEHICLE

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

- If a vehicle was registered in the name of the deceased, attend a Registries office with a copy of the Death Certificate or Funeral Director's Statement of Death. Vehicles can only be operated under the Estate until the vehicle registration expires. The Executor will need to provide a copy of the will to change the vehicle registration. Parking placards may be cancelled at any Registries office.
- The driver's licence or identification card of the deceased should be taken to your local Registries office, together with a copy of the death certificate or a Funeral Director's statement.

### Service Alberta Contact Centre

Phone: 780.427.7013.

## 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.

## STATEMENT OF DEATH

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

## FUNERAL SERVICES & CEMETERIES

### Alberta Funeral Services Regulatory Board

180, 2755 Broadmoor Blvd

**Sherwood Park**, AB T8H 2W7

Phone: 780.452.6130

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

[www.AFSRB.ab.ca](http://www.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 website for a complete list of all licensed funeral services businesses in Alberta.



## Connelly-McKinley Funeral Homes

www.connelly-mckinley.com

Downtown Location:

10014 114 St. NW 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.

## Experience the Compassion

Healing Hearts -Inspiring Trust -Comforting Souls.The difference you will experience at Connelly-McKinley Funeral Home is rooted in our deep belief in connecting with the hearts of the families we serve. By sharing the true story of your loved one with our staff, we learn how to help you share that legacy uniquely through ceremony and care.

We believe in the power of story, in the power of legacy, and we are here to help you tell it.

- 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**

*Experience the Compassion*

*Healing Hearts -Inspiring Trust -Comforting Souls*

The difference you will experience at Connelly-McKinley Funeral Homes is rooted in our deep belief in connecting with the hearts of the families we serve.

We believe in the power of story, in the power of legacy, and we are here to help you tell it.

Complete arrangements made in our office, your home or contactless phone, online, email.

**CALL TODAY TO RECEIVE OUR COMPREHENSIVE PLANNING KIT AND EMERGENCY GRAB N' GO KIT**

*Committed to the Highest Standard of Service & Care*

100% Service Guaranteed!

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**

## The Memorial Society of Edmonton & District

1108 (Bsmt.) - 10235 124 St. NW T5N 1P9

Phone: 780.944.0196

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

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

Hours of Operation: by appointment only  
please phone: 780-944-0196

and Thursday from 11:00 am – 2:00 pm

- The memorial Society of Edmonton and District, founded in 1957, is a nonprofit, non-sectarian society of likeminded 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. NW T5G 0B2

Phone: 780.426.0050

Email: [info@parkmemorial.com](mailto:info@parkmemorial.com)

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

Open 7 days a week

- Our family owned and operated funeral home proudly serves all faiths and cultural backgrounds, 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**

Phone: 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 (FCSS) & Volunteer Centre

Forest Green Plaza, 107 4613 52 Ave.

**Stony Plain**

Phone: 780.963.8583

Email: [pfcss@stonyplain.com](mailto:pfcss@stonyplain.com)

[www.stonyplain.com/fcss](http://www.stonyplain.com/fcss)

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



Wheelchair Accessible 

## We are here for you.

**Pre-arranged Funeral Plans, Personalized Funeral Services,  
Reception Centre, On-site Crematorium and After Care.**

Whether preplanning for peace of mind, celebrating the life of your loved one,  
or needing further grief support, we are here to help with every little step.

**Our family owned & operated funeral home cares about you.**

Edmonton: 9709 – 111 Avenue | Toll Free: 1-877-426-0050 | 24 Hours: 780-426-0050  
[info@parkmemorial.com](mailto:info@parkmemorial.com) | [www.parkmemorial.com](http://www.parkmemorial.com)

Compassionately serving Edmonton, Lamont,  
Mayerthorpe, Smoky Lake, Vegreville and  
surrounding communities since 1941.



**Park Memorial**<sub>Inc.</sub>  
Funeral Home, Crematorium  
and Reception Centre

