

DEPARTING DETAILS

Workbook



A step-by-step guide to leaving your loved ones with the information they need to know when you die.

BY ROSEMARY PAHL



Estate Planning for:

FINANCIAL AND LEGAL INFORMATION



PERSONAL INFORMATION

In this section, include the following information:

Name

Date of Birth

**Social Insurance or
Other Country ID**

**Marriage Certificate (or details of your marriage such as year and
location of marriage)**

Military Service Serial Number and Service Dates

Names and Birthdates of Children

PERSONAL INFORMATION CON'T.

Names, Birthdates and Birth places of Parents

(Include your mother's maiden name.)

Originals or Copies of S.I.N. or S.S. cards, Birth Certificates

If you are a dual citizen be sure to include documents from both countries.

Copies of current passports.

Your executor may be required to produce some of these documents.

Enclose the above information and the original S.I.N. or S.S. card, birth certificate and marriage certificate in this tab.

KEY ADVISORS AND STAFF

In this section, include the name, number and email address, for the following:

Executor of Your Estate

.....

Investment Manager

.....

Banker

.....

Life Insurance Agent

.....

Doctor

.....

Clergy

.....

KEY ADVISORS AND STAFF CON'T.

Funeral Home (Now is a good time to pre-select one.)

.....

Accountant

.....

Lawyer

.....

Vehicle and Home Insurance Agent

.....

Enclose the list above or business cards for each advisor in this tab.

YOUR WISHES



BIOGRAPHY, OBITUARY AND PHOTOS

While this last task will seem somewhat daunting, it is perhaps the most rewarding in the workbook because it will give you a chance to reflect on your life and appreciate what you've created and how far you've come. Your family will need key biographical details for your obituary if you choose to have one. Even if you choose not to have an obituary, a short biography can provide a meaningful starting point for speakers and, displayed at a service or printed in a program, can offer mourners fascinating insight into your life's journey. You may not think your life story is all that interesting but—trust me—it is. Consider the Key Biographical Details questions below, and if you feel confident, consider trying to write a first draft of your own life story (if you do it on a computer, be sure to print it out and then leave instructions for finding the editable file on your computer). Review obituaries in newspapers or on funeral home websites to get a sense of your content and tone preferences—print out a few of your favourites and include them here. At the very least, fill in the key biographical details, include a recent resume, any news clippings about you or, if you're truly notorious, a link to your Wikipedia page.

If you have a family tree, genetic or DNA testing results, insert them in this tab.

Notes:

BIOGRAPHY, OBITUARY AND PHOTOS CON'T.

1) Would you like to have an obituary? If so, do you prefer a particular newspaper or educational institution publication?

2) Are there any facts of your life that you've truly laid to rest and would rather not have spoken about at your death? These can include former marriages or relationships that just don't feel relevant anymore or painful events that you'd rather not bring up. Before you answer this question though, consider that adversity, and how you chose to deal with it, is a very important part of your life's journey.

If you have elderly parents, it is strongly recommended that you take the time now, when you are not grieving, to talk with them and write their life stories or draft obituaries. When my mother died unexpectedly at 92 years of age—yes unexpected at 92!—I had great difficulty writing her obituary while dealing with shock, grief and logistics. As a result, I wrote a draft of my dad's life story and had it ready to edit into an obituary when the time came.

BIOGRAPHY, OBITUARY AND PHOTOS CON'T.

Key Biographical Details

1) Date of birth

2) Place of birth

3) Names, birthdates and occupations of parents

4) Names and birthdates of siblings

5) Significant life events in childhood that altered the course of your life

6) What did you do after high school? Post-secondary education or work?

BIOGRAPHY, OBITUARY AND PHOTOS CON'T.

7) If you attended post-secondary education, where? What did you study?
When did you graduate?

8) Make a list of all your significant jobs.

9) Make a list of all names and dates of all the times you moved cities and
your reasons for moving.

10) In the course of your career were your accomplishments recognized
by the by awards or by mentions in the media? If you have news clippings,
enclose copies here.

BIOGRAPHY, OBITUARY AND PHOTOS CON'T.

11) Did you retire? If so, where did you live for your retirement? Did you choose to do anything specific with your retirement time?

12) What are your hobbies?

13) If you married, list the date of your marriage and the names of your spouse. If you married more than once, list those marriages too, if you would like them to be a part of your biography.

14) If you have children and grandchildren, list their names and birthdates.

BIOGRAPHY, OBITUARY AND PHOTOS CON'T.

15) Do you have pets that have been a significant part of your life? If so, list them here, including names and breeds.

16) List military service and any citations or awards.

17) List memberships and affiliations.

18) List any special friends or health care providers who you wish to recognize.

**Enclose a written life story or obituary in this tab.
Alternatively, complete the questionnaire in the spaces
provided, it will give your heirs the information they need to
write an obituary or service program when the time comes.
Enclose any relevant articles, resumes and photos.**

RECORD OF UPDATES

The initial completion of the DDW will likely take a number of months. Once you've completed it, I recommend updating any relevant changes once a year, or whenever you've had a big life change, such as a marriage, a move, or a significant illness.

Year of Completion

	Month	Year
First Update
Second Update
Third Update
Fourth Update
Fifth Update
Sixth Update
Seventh Update

ABOUT THE AUTHOR



Rosemary Pahl RN, MBA

Following the deaths of her elderly parents and a close friend, Rosemary learned first hand how overwhelming it can be to wrap up a loved one's estate without the necessary information, so she created the Departing Details Workbook as a gift for her family. Over a 30-year career Rosemary held CEO, COO and CFO positions in hospitals, a medical laboratory, a rail tour company, and a national law firm before semi-retiring in 2007 to join the family oil and gas business and pursue her passion for painting. Rosemary would love to hear your thoughts and feedback about DDW—drop her a line at info@estateworkbook.com.

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