

Keeping in touch with *Our Donors*

Fall 2018



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Caring Connections

An update for Friends Supporters

THREE QUESTIONS TO ASK BEFORE PREPARING YOUR WILL

Have you been thinking about your estate plans recently? Are you considering making an appointment with a lawyer to prepare a new or update your existing will? If so, answering the following questions will help you prepare for your appointment and could save you time and money.

1. What? This first question addresses your assets and liabilities. What do you own and what do you owe? Estimate the current value of your estate. Make a list of everything you have including, real estate, vehicles, collectibles, bank and brokerage accounts, insurance policies, etc. Also, make a list all of your financial obligations. This inventory will help your lawyer understand the current status of your estate.

2. Who? You need to decide on those who will look after your affairs when you are gone. Who do you want to serve as your executor? This personal representative should be someone you consider fully trustworthy. You should also determine who will serve as guardians if you have dependent children. And, what about one or more trustees to oversee any

trusts you may have? In addition to these people, try to come up with alternates just in case any of your primary choices cannot serve. Also, be sure to ask all of these individuals before including them in your will.

3. Where? This can be the most difficult part of planning your estate. Where will you transfer your assets? A surviving spouse will likely receive all or part of your assets. Family members may be beneficiaries as well. And, you may want to consider an estate gift to those organizations you have supported during your life; organizations that reflect your interests and values like the Friends of The Moncton Hospital Foundation.

To help you answer these questions, the Friends of The Moncton Hospital Foundation has a helpful **Will Planning Guide** which can assist when you start working on your estate plans prior to visiting with your lawyer.

**To obtain your free copy please
call H el ene Ouellette at (506)
860.2307 or email
Helene.Ouellette@HorizonNB.ca**



*You are urged to seek the
advice of your tax advisor,
lawyer, and/or financial
planner to make certain a
contemplated gift fits well
into your overall
circumstances and
planning.*