

# Ready – Set – Plan!

This worksheet is to help you get started with making and registering a plan for who will act on your behalf in the event you are incapable of making decisions.

The accompanying fact sheet *Make and Register a Representation Agreement* provides information and examples based on the laws in British Columbia.

This worksheet poses questions for you to consider. It will help you be better prepared for making your plan.



## ① Gather information

Sources of information:

- Read the accompanying fact sheet *Make and Register a Representation Agreement, March 2009*.
- Visit the Nidus website at [www.nidus.ca](http://www.nidus.ca)
- Attend a presentation if available. Nidus, other community groups and professionals may hold seminars on this topic. For Nidus events visit the Nidus website, see the calendar under “News and Events.” You can also contact Nidus by phone to inquire.
- Contact Nidus if you have specific questions or need more information.

Review what you have in place now and what you need:

- List what you have in place so far.
- Q Do you have gaps in your plan? Do you need to make changes? Are you just getting started?

## ② Talk with the people you want to involve

It is important to choose people you are comfortable with and who will respect your wishes.

- Set up a meeting, in person or by phone, to talk with family and friends about your ideas.
  - Note any questions or concerns they might have that you need to address. For example, they might be concerned about meeting your expectations.
- Q Are there practical issues to think about? For example, if you want someone who lives in another city, province or country to be your representative, can you arrange for local neighbours or friends to contact your representative if they know you are in hospital and need help?
- Q Do these discussions produce more questions? Contact Nidus to get help with answers.

The people you appoint will need information on their roles and responsibilities.

- Let them read the accompanying fact sheet *Make and Register a Representation Agreement*.
- Give them the Nidus website [www.nidus.ca](http://www.nidus.ca) or they can phone Nidus.

## ③ Think through the set-up of your document(s)

Determine the areas of authority you need to cover.

- Q Do you have some things in place already?
- Most people will make a Representation Agreement to cover health and personal care and an Enduring Power of Attorney for financial and legal matters.

Decide how many people you will name and what roles they will have.

- Q Will you choose a different person for finances than for health and personal care? If yes, how do you want them to work together? What if money is needed to pay for medical equipment, private care or facility care? What takes priority – spending money on you or saving it for the estate?

**Q** If you name more than one person for the same role, how do you want them to communicate and work together? For example, if you name two representatives, do you want them to act jointly or may they act separately? What if they disagree?

**TIP:** If you make an Enduring Power of Attorney (EPA), make sure your name on the EPA matches your name as it appears on the title of your real estate property. This makes it easier if the person you appoint has to use the EPA at the Land Title Office.

## ④ Make and register your plan

Here are some options for making your documents:

- If your Representation Agreement will include additional (broader) health and personal care powers, you must consult a lawyer. The law will change to remove the requirement to consult a lawyer, but there is no set date. Keep in touch with Nidus for news.
- To make a Representation Agreement with only standard powers, Nidus offers a Self-help Kit (\$50 for individuals; \$85 for couples).
- If you are making an Enduring Power of Attorney and want to be sure it can apply to real estate matters if necessary, it must be signed by a lawyer or notary public. To find a lawyer, call Lawyer Referral at 604-687-3221 or 1-800-663-1919. To contact a notary public, call the Society of Notaries Public of BC at 604-681-4516 or 1-800-663-0343 or [www.notaries.bc.ca](http://www.notaries.bc.ca)
- If you are not sure how these options apply to your situation, contact Nidus to discuss.

Nidus operates the only centralized Registry for Representation Agreements and Enduring Powers of Attorney.

- If you use the services of a lawyer or notary public to make your documents, you can ask them to register it for you or you can contact Nidus directly.
- Registration is \$25 to set up your record and register the first document. Each additional document is \$10. There are no annual fees.
- If you use the Nidus Self-help Kit, the registration fee is included.

## ⑤ Distribute copies and keep information current

- Keep your original in a safe but accessible place. Give copies to those you have named in your documents. Give copies to key professionals and institutions.
- If you go to hospital or other care setting, make sure a copy of your Representation Agreement is put in your chart or file.
- If you sign any advance care planning forms put out by the Health Authority or a living will or advance directive or other hospital or facility forms about your wishes for care or treatment, ensure you give a copy to your representative.
- Completing your plan offers peace of mind. But you should review it from time to time to ensure it is still current.
- Most important is to keep in contact with the people you have named. Keep them informed of changes in your health and personal life.
- Prepare a list of contact information that representatives and attorneys may need if they have to act on your behalf. See the example *Personal Information Record* on the Nidus website in the section called *Information and Publications*.
- Keep the Registry up-to-date if phone numbers change.

**Nidus** Personal Planning  
Resource Centre and Registry

411 Dunsmuir Street,  
Vancouver BC V6B 1X4

TEL. 604.408.7414  
FAX. 604.801.5506

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

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