

# **“Just in Case...”**

## **Preparing, Collecting and Organizing Important Documents**

(Part 2 of 3)

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November 2012



As well as preparing the legal documents described in part 1 of this series, there are several other practical and important steps you can take to make it easier for the people responsible for tasks after your death to carry out their duties quickly and efficiently. Sharing information about your financial matters might make you feel uncomfortable: we usually think about our financial affairs as private. However, to plan for life-altering experiences, you need to make sure that even private information is accessible to those who will need it.

Set up a box or binder to hold all the information someone would need if you were no longer able to provide it yourself. Keep the box or binder in a place that is safe but accessible by your family and your executor. Unless you have a home safe, you should keep original documents in a safety deposit box or other secure location, and identify that location in the box or binder.

### **Collect or create the following:**

- Instructions for what to do first in

the event of crisis. This might also include a lawyer's instructions for how to proceed.

- Your will.
- Information on prepaid funeral arrangements and funeral requests.
- Copies of all family birth certificates and vaccination records.
- Copies of all family passports.
- Bank information for all your accounts, including bank name, address and account numbers.

Note: It may be wise to have at least one bank account set up as a joint account with a trusted close relative, spouse, or friend so that funds remain easily accessible after your death (this is particularly important for single parents). Your executor will need immediate access to cash to settle any outstanding accounts and to support your survivors.

- Credit card information so that these cards can be cancelled

immediately.

- E-mail accounts and passwords: this is particularly important if bills are paid on-line and through e-mail. Also, it may provide a list of people to be notified.
- Insurance policies.
- Records of outstanding debts.
- Copies of all paperwork associated with any child support payments. In single parent families, if the custodial parent dies and children will not then be in the custody of a surviving parent, someone will need to re-apply for child support. This involves filling out forms and submitting them to the appropriate family court.
- Pension information and specific information about benefits received through the workplace.
- Tax returns for you and, if applicable, your child.
- Contact information for your lawyer, accountant, and other advisors.
- Information about how to provide comfort to your child. Include a list of the child's preferred activities (including TV shows and movies) and foods, as well as information about sensory sensitivities, behavioural issues, and sleep patterns.
- Detailed information about your child's disability, including documents such as psychological and adaptive functioning assessments, medical reports and your child's Individual Education Plan (IEP) or any transition or person-directed plan. Also include general information about ASD itself.
- Names and contact information for your child's doctors, as well as any specific medical concerns.
- Information about the agencies, organizations, or programs your child accesses, the services and funding that they provide, and who to contact at each group. Include a copy of any documentation related to those services. For funding that must be applied for regularly (SSAH, Passport, etc.), include a sample of past funding applications as a model to follow for future applications.
- If your child has not already been through the Developmental Services Ontario (DSO) process, include information about DSO

## **Also include information about your child with ASD:**

- An up-to-date list of medications your child takes, including the dosage and when it is taken. This can be critical if your child is not able to manage his or her own care.

([www.dsontario.ca](http://www.dsontario.ca)), which is the entry point for services once your child turns 18. Discuss with the guardian how the structure of adult service delivery may affect the future of your child.

- Once a year, meet with the people who will be instrumental in supporting your child, so you can discuss any changes to your situation. Be sure they know your hopes, dreams and wishes for your child's future. At the same time, update the information listed above so it always stays current. As circumstances change, you should also review the terms of your will.
- The ultimate goal is to ensure the future security of your child with ASD. In part 1, we discussed the

creation of a will, a trust, and other financial planning. In this tip sheet, we outlined the most important documents and information that need to be made easily accessible. In the third tip sheet in this series, we deal with the role family, friends, and siblings can play in the future of your child with ASD.

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