



The Diocese of Edmonton

Planned Giving Office

Ensuring Your Property Goes to the Persons and Organizations You Choose

If you do not have a will, you give up the right to choose how your property will be distributed when you die. Instead, the court will decide for you in accordance with provincial law and the court will also decide who administers your estate. While it is possible you would be satisfied with the court's choice of administrator and the division of your property by law, more likely you would not be. For example:

- You may have wanted your children to receive your property only after your spouse's death, not get part of it now as provincial law dictates.
- You may have preferred to give some children a larger share because of special needs, not equal shares as provincial law requires.
- You may have chosen to leave legacies to some special friends rather than the distant relatives stipulated by the province's rules for next-of-kin succession.
- You may have intended to leave a bequest to your church or a charity that played an important role in your life, but the laws of intestacy make no allowance for churches or charities. In fact if you have no surviving relatives, the province becomes your heir.

By preparing a will you exercise your fundamental right to choose what to do with the accumulations of a lifetime. Nevertheless, if your will is not part of a general estate plan, your wishes could still be frustrated—even to the extent of disinheriting those you most want to help. For example, an asset you intended to divide equally among all your children could be passed entirely to one of them because it was placed in joint tenancy with that child and is therefore beyond the scope of your will. Or, if your will specified particular securities which have since been sold, a charitable bequest you intended to make could go unfulfilled.

Good intentions are not enough! To ensure property goes to the ones you wish, make sure your estate plan integrates property governed by your will, property in trust, and property that passes to a beneficiary under joint tenancy. Revise your will when you acquire or dispose of major assets, or when you have major life events such as marriage or the birth of a child. And be sure to select someone who is trustworthy, competent, and who understands your wishes and your values, as your executor.

If you have questions or want to learn more about this, or any other, type of planned gift, please contact me, in confidence and without obligation, at the following:

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