

# The Butler Bulletin

Butler Wills and Estates

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Listen for us on VOXM!

For the week starting February 15, we will have our first commercial on the morning news on VOXM.

Tune in to hear a spot voiced by Lynne, and to hear a bit more about what we do.



This is Roxy, our “guard” dog. She’s only part-time, and comes to work about three days a week. She’ll greet you with dancing and a great big smile when you come for an appointment.

Did You Know...?

According to the BMO Wealth Institute, 50% of people don’t think to include any digital assets in their will. Sometimes these include something with financial value, but often they also have sentimental value, such as digital photos.

The *Get Started Kit – Preparing an Executor’s Accounting* is now available!

This 19 page kit includes:

- ✓ A sample statement of receipts and disbursements
- ✓ A sample statement of proposed executor’s compensation
- ✓ A sample statement of proposed distribution
- ✓ Instructions for completing all documents
- ✓ Information about how, when, and why to present an accounting
- ✓ Links to legislation and other useful resources

*Preparing an Executor’s Accounting* is a great follow-up to *Get Started – Record-Keeping for Executors and Estate Administrators*.

This 12 page kit contains:

- ✓ A form of ledger you may use to set up and maintain your records
- ✓ Instructions for preparing and using the ledger
- ✓ Instructions to help you minimize complaints and enquiries from beneficiaries
- ✓ Links to helpful resources and information

For February only, purchase both and receive 10% off! Each kit is \$15.00 + tax.

Visit [www.butlerwillsandestates.com](http://www.butlerwillsandestates.com) or call 709 221 5511 to order.

## *Reducing Stress When Caring for an Aging Parent*

Many of the clients we see are adult children who are or soon will be looking after their aging parents. This puts a lot of stress on both the parents and the child.

The children have the responsibility of things like taking their parents for mental assessments, taking away car keys, or hiring a professional nurse.

This process can also be distressing for the parents. They used to be in charge of taking care of their children, and now it's the other way around. They may also be disoriented and confused as to why they cannot make the decisions that they used to.

This stress is exacerbated when there is something that should be done in the parents' best interest, but they don't want to do it.

Here are some tips to help minimize the strain.

1. Involve your parents in the decision-making process. The level of involvement each person can handle is different, so there is no set list of things to include them in. However, if an aging parent isn't capable of making financial decisions, he or she might still want to make personal decisions such as the groceries, clothing, and personal items around the home.
2. Communicate with your parents and siblings. Finding efficient ways to communicate is key. If your parents are becoming confused or disoriented, explaining matters to them ahead of time can help. Answer their questions the best you can. Knowing ahead of time what will happen can prevent them from feeling taken by surprise. Keeping any siblings in the loop will prevent you from having to explain the same thing over and over to each person, and if your parent asks them for clarification they will be able to explain, instead of adding more confusion with a different answer.
3. Stay calm. Your parents will pick up on your emotional distress, which will add to their anxiety. Crying, yelling, or otherwise getting upset can cause aging parents to assume there is frightening information you haven't told them, and lead them to interpret situations negatively. If you need to take a break, do so. Often other family members aren't available to help out. In these cases you should consider hiring a caregiver, even if it is only for a couple of hours a day. Other options are someone to help with the housekeeping, errands, or cooking.



"First off, you admitted to using shoddy materials during construction. Secondly, exhaling is not a crime. And, finally, three does not a class action lawsuit make."

**Coming Soon!**

Lynne's book, *Alberta Probate Kit*, is one of her best-sellers. There have been numerous changes to the law since it was published in 2011, and updates have been published along the way. Lynne has now written a whole new version, available soon from Self-Counsel Press. Visit the link below for all her SCP books:

<http://www.self-counsel.com/catalogsearch/result/?q=lynne+butler>

***Executor Boot Camp***

Did you miss Executor Boot Camp or live outside the area but still need the information?

We'd be happy to send you the information package included in the session for \$40.00, tax and shipping included.

When you order, you can request either a paper copy or a flash drive. Email [chelsea@butlerwillsandestates.com](mailto:chelsea@butlerwillsandestates.com) or call 709 221 5511 for details and to order.

**February Seminar Schedule**

**Most Common Questions about Probate**

This seminar answers the most frequently asked questions about probate, including: What is probate? Do all wills need to be probated? How much does probate cost? How does joint ownership of property affect probate? and others.

Thursday February 4 @ 1:00 PM  
Thursday February 11 @ 7:00 PM

60 minutes, \$20.00 per person

**Top 10 Things not to do in Estate Planning**

This seminar tends to keep the audience laughing, despite covering topics that are usually considered serious. It covers issues such as joint bank accounts, leaving the cabin to the kids, and choice of executor. Almost all audience members admit to having done at least one of the ten steps Lynne explains should not be done. Each "do not do" is followed by alternatives that audience members can put into action. This seminar has been presented successfully to general audiences of all sizes, as well as to professional groups, and was one of our most popular in 2015.

Thursday February 18 @ 1:00 PM  
Thursday February 25 @ 7:00 PM

75 minutes, \$25.00 per person

*Call or email to reserve your seat. Payment can be accepted at the time of the seminar by cash or credit. Light refreshments and a copy of the presentation are included.*

## Criminology Corner



### What Can You Do if an Executor Refuses to Give You Information?

We've all heard stories of an executor running amok on an estate. Many executors don't know what they're doing, since it isn't something people tend to do more than once.

Many executors believe that the will gives them full legal power to do whatever they want with the estate.

By the time anyone else involved in the estate realizes that the executor has done something they shouldn't have, the estate is empty.

So what are the options for a beneficiary? The first thing that occurs to most people is to sue the executor. You certainly can enforce your rights this way, but it tends to be expensive. The police may investigate the executor for executor fraud, but paying a lawyer for the duration of a lawsuit isn't financially an option for everyone.

Here are some other ways to enforce your rights as a beneficiary:

### Mediation

This is one of the more cost-effective ways to sort out an estate. In mediation, the cost of the session is divided among all the parties involved, not just the person who decides to start it.

With mediation the group makes the decision about what to do to solve the problem – there is no judge telling everybody what to do. As a group everyone involved decides what the best course of action is, with a neutral mediator helping things along.

### Know Your Rights

Sometimes the beneficiaries ask for things such as progress reports or the selling price of an asset, and the executor refuses to share that information even though the beneficiaries have every right to it. Other times they ask for outrageous things like access to all the bank accounts, and the executor allows it.

These situations are most commonly caused by each party not really knowing what they have a right to ask for, or what info they should be sharing.

### Prevent the Problem

Choosing a good executor is the easiest thing to do to prevent a problem down the road. Often parents choose the oldest child, or the only male, or the child that lives closest to them to be their executor. This works if that person also happens to be good with money, organized, and honest. It doesn't work so well if that person has a gambling addiction, has gone bankrupt a couple times, or bullies his/her siblings.

Carefully selecting an executor can prevent all sorts of problems, including executor fraud and an expensive lawsuit.

*Please feel free to share this newsletter with others. If you have any questions, comments, would like to suggest a topic, or would like to unsubscribe, please email us at **[chelsea@butlerwillsandestates.com](mailto:chelsea@butlerwillsandestates.com)***