



Trustee Times Trustee Times

Seasons Greetings

As 2006 draws to a close and we look back in retrospect we see that more and more families are thinking about and asking questions about future planning. Here are some numbers – from July 2005-June 2006 the Co-ordinator met with 30 Peel families in total. **Since June 2006, she has met with the same number of families (30)!** The public education programme is more popular than ever – one wills and estate planning seminar had 75 participants! The last professional luncheon, on November 8, 2006 drew a total of 30 lawyers and financial planners. Now STAS hopes to reach more people with the new **Planning Workbook**. We are pleased with how far we've come but know that there is still much work to be done to ensure Peel families have the future planning information they need.

New! New!

STAS Planning
Workbook

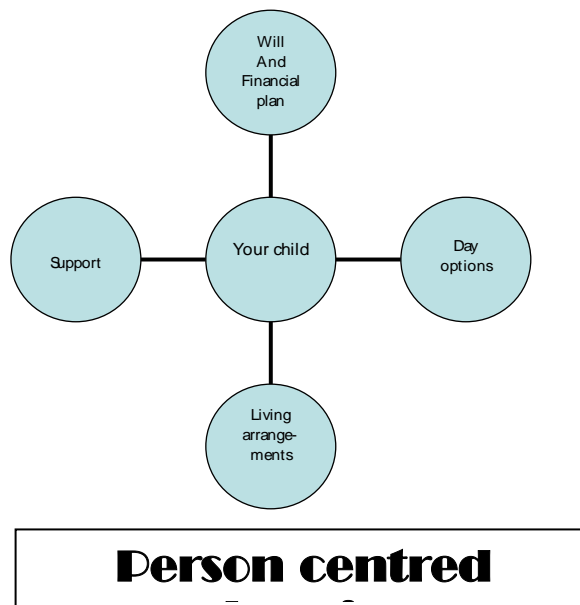
is available
free of charge
to interested
families !

See page 2 for more
details

★STAS is pleased to announce that the new parent planning workbook is available. To receive a copy of this workbook, call Sue Taggart at 905-542-2694 ext 2312★

Below is a list of topics that are explored in the workbook:

- A. Support & Trustee Advisory Services.....Page 4
- B. First things first....overview..... Page 5
- C. Wills and Financial plans..... Page 7
- D. Absolute Discretionary Trust..... Page 8
- E. Choosing a Lawyer..... Page 9
- F. Choosing a Financial Planner..... Page 10
- G. Fact Sheet #1 Review of Assets..... Page 11
- H. Fact Sheet #2 Some Decisions about Executor/Guardian.. ...Page 14
- I. Fact Sheet # 3 Some Decisions about Division of Estate..... Page 15
- J. Fact Sheet #4 Financial Decisions.....Page 16
- J. Fact sheet #5 Medical Decisions.....Page 17
- K. Day Options.....Page 19
- L. Fact Sheet #6 Some Quality of Life Decisions.....Page 21-25
- M. Living Arrangements.....Page 26
- N. Agency Provided Residential Setting.....Page 26
- O. Private Residential Setting.....Page 27
- P. Fact Sheet #7 Living Arrangements.....Page 28-31
- Q. Circles of SupportPage 32
- R. Fact sheet #8 Circles of Support.....Page 34-35
- S. Fact Sheet #9 Are There Shortfalls?.....Page 36
- T. Fact Sheet #10 To do List.....Page 37
- U. Conclusions.....Page 38
- V. Resources.....Page 39-40



This diagram is a simple representation of the various aspects that need consideration in your planning process.

Resources Available for members of STAS to borrow: *If you are interested in borrowing any of these resources please call Sue and she will be happy to assist you!*

Name	Author	Summary
A Family Handbook on Future Planning	The Arc of the United States	primarily legal/wills/financial planning - American resource 2003
a little book about Person Centered Planning	Inclusion Press	A collection of essays around the topic of person centered planning
A Place Called Home	Allison Ouellette	recounting of a family's adventure in moving their son to his own home book
All My Life's a Circle	Inclusion Press	Using Circles, MAPS and PATHS to help with future planning
Connections-a planning guide	BCCL, Ken Pike	overall planning guide - from 1993
Creating Circles of Friends - a peer support and inclusion workbook	Inclusive Solutions UK Limited	creating circles of friends
Friends- A Manual for Connecting Persons with Disabilities and Community Members	Human Services Research and Development Center	suggestions for connecting people who have a disability in their community
Inclusion - How To	Inclusion Press	Classroom strategies to promote inclusion
Lifetime Security Planning Kit	LifeTRUST (Planning Company)	a detailed workbook that encompasses financial planning and wills
Long Term Planning & Support Program	Ontario Federation for Cerebral Palsy	binder explaining this program
Make a Difference	Inclusion Press	A guidebook for person-centered direct support
More Like a Dance	Institute for Community Inclusion	American workbook that looks at circles and person centred planning
My Life My Dream	Indiana Institute on Disability and Community	A guidebook to Person Centered Planning
New Maps - Training Video	Inclusion Press	a training video demonstrating the creation of a MAP
One Candle Power	Inclusion Press	future planning - circles, building capacity etc.
PATH - A workbook for planning positive possible futures	Inclusion Press	Planning alternative tomorrows with hope for schools, organizations, families
Peace of Mind	Plan Institute	a guide to help with future planning
Person Centered Planning with MAPS & PATH	Inclusion Press	a workbook for Facilitators to work with MAPS & PATH
Reach for the Dream	Training Resource Network	A book to help develop individual service plans for persons with disabilities
Re-Discovering Maps: Charting your journey	Inclusion Press	a video showing the power of MAPS
Removing the Mystery	Ontario Federation for Cerebral Palsy	based in Ontario, financial planning, a few worksheets
The Company of Others - Stories of Belonging	Plan Institute	Examples/stories of social circles of marginalized people
The Ties That Bind	Plan Institute	story of one family setting up a circle around their disabled son - NFB show

**new members wanted •
no experience necessary!**

To learn more about STAS, simply complete the form below and mail or fax it to STAS at 905-542-0987. Alternately, contact our coordinator, Sue Taggart at 905-542-2694 ext. 2312 or 905-453-8841 ext. 548:

I want to learn more about STAS!

Name: _____

Address: _____

email: _____

telephone: _____ home

_____ work

- I want to be a member! My registration form and \$10.00 membership fee are included!
- I want to purchase a print - please contact me!
- I want to be meet with the coordinator regarding future planning!
- I want to know when there will be a wills and estates seminar