

# WHO ARE YOU?

## How can Orderly Affairs help you?

Double-click on who you are to learn how Orderly Affairs can help you.

### Contents

Accountant .....	2
Appointed Executor.....	2
Confused about getting my affairs in order .....	3
Community/Volunteer Group .....	3
Death Doula.....	4
Employee Management Team .....	4
Interested in End-of-Life Education and Planning.....	5
Family Doctor .....	6
Financial/Investment Advisor .....	7
Older Adult Home Care Manager.....	8
Older Adult Residential Manager .....	8
Parents are getting older .....	9
Seeking guidance.....	10
Single Senior.....	10
Lawyer .....	11
Realtor .....	11
Retiree Association.....	12

## Accountant

### Who are you?

**As an accountant**, I understand the importance of organizing financial details for tax and business purposes well before tax time. I'm looking for a resource to help my clients organize their information for estate planning, particularly for their executors. Can you suggest a solution?

### How can Orderly Affairs help?

Our self-directed [Orderly Affairs Guide](#) is available to help clients organize their required documentation and get their affairs in order, no matter where they live in British Columbia.

We also offer [Advance Care Planning](#), providing a broad range of information and resources specific to future healthcare planning in British Columbia.

Please see the [testimonials tab](#) on the Orderly Affairs website to learn more about how our services have helped others.

## Appointed Executor

### Who are you?

**I am the executor of my parents' will, but I don't know what information I need to fulfill my responsibilities.** Frankly, I am not sure they do either!

### How can Orderly Affairs help?

The [Orderly Affairs Guide](#) is a self-directed workbook that provides information and outlines essential tasks for organizing and maintaining your affairs in British Columbia. It is a repository for important documents and information. Utilizing this Guide can save your estate thousands of dollars and spare your representatives from unnecessary stress. Getting your parents to complete the vital work outlined in the Orderly Affairs Guide will give you, as the executor, peace of mind, knowing that your parents' affairs are in order.

## Confused about getting my affairs in order

### Who are you?

**I am confused!** I was told that my power of attorney (POA) could act on my behalf with future healthcare planning decisions when I cannot, but now I understand that this person is known as a Representative who may or may not be my POA. Help!

### How can Orderly Affairs help?

Getting our affairs in order can be overwhelming, making it difficult to know where to start. Orderly Affairs offers services that address this common experience step-by-step to help you learn and complete the required documentation. If you're feeling unsure, consider attending one of our **free information sessions** that you can sign up for on our website. We'll address some of the most common misunderstandings and help you get started on the path to organizing your affairs.

You can also purchase a [bundle package](#), which includes the Orderly Affairs Guide, Advance Care Planning Digital Workbook, and 2 hours of personal consultation. This package will help you get your affairs in order in British Columbia.

## Community/volunteer group

### Who are you?

We are a **group that meets regularly as a community and often hosts information events.** Would you be able to give a presentation free of charge?

### How can Orderly Affairs help?

Orderly Affairs can provide a **free information session** with an engaging discussion after a 30-minute informative presentation. Contact Orderly Affairs for more information and to set up a booking.

Depending on your group's interests, we can also provide tailored services, such as support with future healthcare planning in British Columbia. We can also coordinate a group of presenters if that might be your interest. [Call or email Daralynn](#) to discuss your specific interests.

## Death Doula

### Who are you?

**I am an End-of-Life practitioner, also known as a Death Doula.** My passion is to support my clients and their families through the emotional journey at the end of life, but inevitably, I get many questions about how to get affairs in order. I want to refer them to an approach that I can use to help them ensure all the details are covered. Do you provide such a resource?

### How can Orderly Affairs help?

The [Orderly Affairs Guide](#) is a comprehensive and easy-to-follow tool for organizing your affairs. It is a step-by-step approach to getting affairs in order, documented, and easily accessible in one place. The Guide is self-directed; however, if your clients need help from you, you can use it as your own resource to help them along.

To see how the Guide has helped other doulas, please check out the [testimonials tab](#) on the Orderly Affairs website.

## Employee Management Team

### Who are you?

**Our management team** is interested in helping our employees prepare for retirement by getting their affairs in order. We would also like to know how to introduce them to future healthcare planning. Can we discuss some options to tailor these conversations to our staff?

### How can Orderly Affairs help?

Orderly Affairs can offer a **free one-hour information presentation** to inspire and motivate attendees on the value of keeping one's affairs in order. Self-directed [Orderly Affairs Guides](#) could be purchased in bulk at a discounted rate for your employees.

Orderly Affairs can also offer group workshops to learn about the realities of preparing for future healthcare planning in British Columbia with [Advance Care Planning](#). Contact Orderly Affairs to discuss this further.

## Interested in End-of-Life Education and Planning

<b><i>Is this you?</i></b>		<b>How can Orderly Affairs help?</b>
W1	I am getting older, and I would like to explore my hopes, fears and beliefs about my life, death and dying.	<a href="#"><u>Making Sense of Life and Death™</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W2	I want to <b>better understand and work through my grieving</b> from past/present events and circumstances. I would also like to consider what others may experience when I die.	<a href="#"><u>Grieving and Healing</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W3	I consider legacy as a concept beyond finances and traditional assets. I want to <b>explore the importance and options for sharing my life story</b> to write lasting messages for those I love.	<a href="#"><u>Legacy, Love Letters and Heart Wills™</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W4	I want to <b>learn about options and articulate wishes for my after-death care, final disposition, and goodbye rituals</b> . I want to talk to someone about budgeting and planning for this before I approach a funeral home service.	<a href="#"><u>Departure Directions™</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W5	I want to <b>learn about and then share what's important about my health and personal care</b> before any illness or injury occurs.	<a href="#"><u>Health, Personal-Care Wishes &amp; Decision-Making</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W6	I want to be <b>informed and prepared to meet with a legal representative</b> to ensure my people, assets and legacy are cared for according to my values and wishes.	<a href="#"><u>Financial and Legal Authority</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W7	I want to <b>consider downsizing before the need to do so</b> and how to declutter, record information and collect papers, personal items, accounts, policies, memberships, key contacts and where to find things as part of downsizing.	<a href="#"><u>Organizing and recording</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W8	I want to <b>consider healing relationships that need mending</b> , reflecting on, and possibly attending to unfulfilled dreams and wishes.	<a href="#"><u>Unfinished Business</u></a> with Orderly Affairs End-of-Life Education and Planning Service
W9	I would like to <b>share my insights and communicate my wishes</b> with those who need to know and learn about my family and friends' hopes, fears, and desires.	<a href="#"><u>Courageous Conversations</u></a> with Orderly Affairs End-of-Life Education and Planning Service

W1-9 services can be delivered in a 1:1 or group workshop format.

Content is based on Willow licensed end-of-life education/planning curriculum (Reality of our Mortality™ Checklist).

You can book a free consultation with Orderly Affairs for End-of-Life Education and Planning Service to discuss your interest in these topics.

## Family Doctor

### Who are you?

**As a family doctor**, I often find myself short on time to properly educate my patients on advance care planning in British Columbia. Could you provide my patients with a clear understanding of what this entails in British Columbia so they can come to me well-informed? This would allow us to have a more productive conversation focused on a higher level of care.

### How can Orderly Affairs help?

Orderly Affairs can support you and your clients anywhere in British Columbia by organizing [advance care planning](#) workshops *before* meeting with you. Our service reviews future health care planning topics such as defining incapability, considering our values and wishes at the end of life, the Representation Agreement, life-prolonging interventions, and processes specific to British Columbia such as Medical Orders for Scope of Treatment (MOST), No Cardiopulmonary Resuscitation (No CPR) and Notification of Expected Death in the Home (EDITH).

## Friend Group

### Who are you?

Recently, **a close member of our friend group** passed away suddenly. We were all caught off guard, and the conversation around death became awkward. Some have confessed that they want to be more comfortable about this subject. How can you help us?

### How can Orderly Affairs help?

You could organize a gathering for your friends called "[Dinner with Daralynn](#)." I can help guide and facilitate a friendly and interactive discussion around challenging questions that will allow you to understand the importance of addressing these issues sooner rather than later. As an impartial third party, I will be uniquely positioned to offer suggestions and facilitate discussions that are neither personal nor relational. The focus will be on the Reality of our Mortality™.

Consider attending regular discussion evenings known as "[Speaking of Death](#)." These are fun learning experiences for those curious about what is involved in end-of-life planning. You will find detailed information about this event under the Contact Us Tab on the Orderly Affairs website.

## Financial/Investment Advisor

### Who are you?

**As a financial advisor**, I understand that my clients face challenges when planning for future healthcare and preparing their executors with the necessary details of their affairs. Although these issues are not part of my role, I have built strong relationships with them over the years and would like to offer my support to them and their families. How can I assist them with these responsibilities?

### How can Orderly Affairs help?

Our self-directed [Orderly Affairs Guide](#) is available to help clients organize their required documentation and get their affairs in order, no matter where they live in British Columbia.

We also offer [Advance Care Planning](#) workshops, providing a broad range of healthcare information and resources specific to British Columbia. To learn more about how our services have helped others, please look at the testimonials tab on the Orderly Affairs website.

[Orderly Affairs](#) can also suggest different services related to aging, such as downsizing, residential living and funeral planning in the Greater Victoria District. Contact Daralynn Wei directly to discuss further.

## Getting Older

### Who are you?

**I am getting older**, and while I have some ideas of what I want and need to do, I would like to discuss them with an objective and knowledgeable listener.

### How can Orderly Affairs help?

Are you aging and need help considering housing and future healthcare planning? Do you have your affairs in order but want to discuss what else you might not have considered? Do you want your executor and healthcare Representatives to be prepared for their responsibilities including funeral planning? I would be happy to meet with you informally and discuss available resources. This service is known as [Discussion with Daralynn](#). You can email me at [Info@orderlyaffairs.ca](mailto:Info@orderlyaffairs.ca) to arrange a time to meet.

## Older Adult Home Care Manager

### Who are you?

**I manage a home care company** providing all levels of support to aging adults in their homes. Staff often get questions or comments from clients about their need to get their affairs in order, which is not something our staff are trained to provide. If staff were to refer clients to your services, how would you be able to help our clients?

### How can Orderly Affairs help?

Your employees play an important role when communicating with clients during their calls. In those conversations, they may encounter additional needs of the clients they are not trained to respond to. However, by referring them to Orderly Affairs, your staff is still providing a useful service as they are providing information to another service that may be able to address these questions. If you need [rack cards or brochures for clients](#), please get in touch with Daralynn Wei directly.

Additionally, you can refer your clients and their families to the [testimonials tab](#) on our website to learn more about how our services have helped others.

## Older Adult Residential Manager

### Who are you?

**I am a manager at a home care residence for older adults.**

Our **care support staff** cares about the residents and would like to assist them and their families with advance care planning-related questions. Providing this service level will also give the staff much more job satisfaction. I want to equip them with this education to be better prepared to provide this support. How can you provide this kind of training?

### How can Orderly Affairs help?

Consider providing your staff with [advance care planning](#) workshops as a professional development opportunity. By enrolling in one of our sessions, they will learn about advance care planning and how it pertains specifically to British Columbians. They will also be guided through the creation of their own plan.

You can either have your staff attend the sessions in staggered groups over several months or request customized training to meet your specific needs. Advance care planning knowledge may also help alleviate issues of moral distress on the job. Our sessions are co-facilitated with a retired healthcare professional who brings a wealth of experience to the session. It's a fantastic opportunity for your staff to learn and grow.



## Parents are getting older

### Who are you?

**My parents are getting older,** and I am not sure how to approach the subject matter of their affairs. Can you give me some ideas on how to approach this?

### How can Orderly Affairs help?

Purchase an [Orderly Affairs Guide](#) for yourself and share why organizing your affairs is important. It may encourage your parent to complete their own Guide, which you can then offer to help them with. This could lead to other valuable conversations you will both appreciate.

You could also ask them if they would like to sign up for a [free one-page bi-monthly newsletter](#) intended to inspire and nudge readers along with their responsibility to get affairs in order.

## Partner/Spouse

### Who are you?

**My partner and I** know we need to get our affairs in order, but we don't know where to start – help!

### How can Orderly Affairs help?

Knowing where to start can be overwhelming when considering how to organize our affairs. The [Orderly Affairs Guide](#) is self-directed and written in a step-by-step format that allows you to tackle one subject at a time. Completing tabs 1-8 of the Guide will also give you a [\\$100 discount](#) with select Legal Firms in Victoria, motivating you to update and/or get your Will done!

You can also sign up for a [one-page bi-monthly newsletter](#) intended to inspire and nudge you along on your work!

You can also purchase a [bundle package](#), which includes the Orderly Affairs Guide, Advance Care Planning Digital Workbook, and 2 hours of personal consultation. This package will help you get your affairs in order in British Columbia.

## Seeking guidance

### Who are you?

I want to talk to someone about end-of-life realities, but I don't know where to start.

### How can Orderly Affairs help?

Having conversations in advance of what you might experience as we get older and approach end-of-life is important. While our [Advance Care Planning](#) service will prepare you for different scenarios for future health care planning in British Columbia, you may have more specific questions on your mind that you would like to discuss. You can browse a selection of those listed on our [End-Of-Life Education and Planning](#) service and book a [free consultation](#) to discuss further.

Consider attending regular discussion evenings known as "[Speaking of Death.](#)" These are fun learning experiences for those curious about what is involved in end-of-life planning. Look under the Events tab on the Orderly Affairs website to find the dates for the next event.

## Single Senior

### Who are you?

**I am a single senior,** and I don't have any family to help me.

### How can Orderly Affairs help?

Think of your future self and what you want, and then have conversations with the appropriate professionals. Have you put age-related appropriate living arrangements in place? This is often the first and most challenging plan to consider. Book a [free Discussion with Daralynn](#), and I will help you sort through some ideas, including referrals to other services.

Consider attending regular discussion evenings known as "[Speaking of Death.](#)" These are fun learning experiences for those curious about what is involved in end-of-life planning and a friendly way to have these conversations and think about how to plan. Look under the Events tab on the Orderly Affairs website to find the dates for the next event.

## Lawyer

### Who are you?

**As a lawyer,** I often deal with clients whose affairs are complex and require much time to organize. I could use some help collecting the necessary documentation to optimize my clients' time and money. Can you assist me in streamlining this process so that we can focus on addressing the more complex issues when they arise?

### How can Orderly Affairs help?

Orderly Affairs can support you and your clients anywhere in British Columbia by organizing them with the required documentation *before* meeting with you. You may want to offer your clients a discount if they purchase an [Orderly Affairs Guide](#) and complete tabs 1- 8 before meeting with you.

Depending on your client's needs, you can also suggest a free one-hour [Discussion with Daralynn](#) to listen to concerns and suggest different services related to aging in the Victoria area, such as downsizing, residential living, and funeral planning.

## Realtor

### Who are you?

**I am a realtor.** My clients have just made the biggest purchase of their life and may be overwhelmed with all the responsibilities that come with that, especially when moving from out of province. How can I help ensure that they become informed on getting their affairs in order and BC requirements?

### How can Orderly Affairs help?

The [Orderly Affairs Guide](#) is about getting our affairs in order, including important information about our assets. Gifting a Guide to new homeowners may be one of the best ways to help them protect this asset by ensuring they have all the documents in one place and can motivate them to complete their estate planning as soon as possible.

## Retiree Association

### Who are you?

**We are a group of retirees** who meet regularly as a community. We often host information events. Would you be able to provide an information session free of charge?

### How can Orderly Affairs help?

Orderly Affairs can provide a [free information session](#) that is always followed up with an engaging discussion. Contact Orderly Affairs for more information and to set up a booking.

Orderly Affairs is also able to provide complimentary, interesting, and concise articles for your association newsletter that are complimentary.

Depending on your group's interests, we can also provide more fee-based specific services, such as a workshop and support with future healthcare planning in British Columbia. To discuss your ideas, you can email Daralynn Wei directly at [info@orderlyaffairs.ca](mailto:info@orderlyaffairs.ca).