



## Who Will Find This Book Useful?

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Most people will find many of the elements of this book useful and a worthwhile investment. However, it might be helpful to be specific about those who will find the information contained here invaluable.

- People who are maintaining, or assisting to maintain, the property and/or financial affairs of a relative or friend, regardless of whether they are acting under a formal CPOAP. Following much of the guidance will ensure that should a formal document be effective at some time, or when an estate trustee steps in, the record keeping has been maintained in such a way that there will be no awkward questions or suspicions that cannot be dealt with easily and effortlessly to the satisfaction of all.
- People who have just been made aware that they are an attorney under a CPOAP, are named as an estate trustee under a will or appointed as an estate administrator by a court order will appreciate this book as a source of valuable information in deciding whether they want to accept the responsibilities and obligations of being either an attorney or estate trustee. At the very least, once reading through the introduction and the first couple of chapters, if they decline to act, they can use this resource to organize their own financial affairs for the inevitability of their own incapacity and ultimate death.
- People who are contemplating making a CPOAP or a will can find this book useful to gain a better understanding of the type of information that the person they are thinking of appointing as their attorney or estate trustee will require in order to perform this task.
- People who are acting as an attorney for personal care or who has been appointed by the court as guardian of the person will also find this book useful, because it will explain why the attorney for property must have certain information and the importance of why the attorney for personal care or guardian must be willing and able to provide that information in a timely and accurate manner.
- People who are acting as an attorney or estate trustee with others will find this book invaluable to help all attorneys or estate trustees understand their legal record-keeping obligations regardless of whether acting jointly (together with another) or acting jointly and separately (acting independently). Ensuring that all the attorneys or estate trustees involved with the same estate have access to this book will increase the likelihood that they are maintaining their part of the financial transactions consistently. This will ensure that all the records can be reviewed efficiently and their completeness and accuracy determined easily.

- Lawyers who prepare CPOAPs and provide estate administration advice to attorneys and executors will find this an invaluable tool. Catering to all levels of sophistication, this book demystifies accounting and legal terminology, presenting in layman's terms the accounting obligations of an attorney acting under a CPOAP or an estate trustee.
- People who have recently acquired the honour and duty of being an estate trustee will find this book useful because it provides a step-by-step approach to identifying and obtaining all the required information to assist them in executing their legal and fiduciary obligations with respect to record keeping and accounting to beneficiaries and potentially the court.
- Finally, anyone who will eventually die (and alas, that is all of us) will find this a useful book. It will identify what information your surviving relatives or friends will need in order to wind up your affairs and distribute your estate as you have indicated in your will. You will leave behind grateful family members should you yourself, while still in full capacity of your senses, gather some if not all of the necessary information that your estate trustee will require.