

GETTING STARTED WITH THE FUTURE PLANNING TOOL

1. Watch the how-to video



2. Step, Topic, Task; what's the difference?

Step



This tool will guide you through 4 **STEPS** in the process to build your plan. In step 2, the tool will recommend topics for your review.

Topic



A **TOPIC** is a broad category that provides information on an area of interest. This tool covers 10 topics. Examples include Income Tax, Housing, and Trusts. Each topic contains a list of tasks.

Task



A **TASK** is a piece of work you need to do to achieve your goals. Examples include apply for a Social Insurance Number, make a will, apply for life insurance.

3. No time to finish your plan now? No problem.

Following the steps to build your plan takes time and it's okay to come back later.

Click this button

 SAVE TO CONTINUE LATER

This will allow you to email yourself a link which you can use later to come back to exactly where you left off. Your information will be updated as you go, so you only need to do this once.

4. One task at a time

So you've built your plan and downloaded or printed a copy. What next?

-  **1** Start with the **TOPIC** that you want to work on first. Take one **TASK** and break it down into 3-5 minor tasks.
-  **2** List who can help support you with each minor **TASK** - there is no need to work alone! This could be a friend, family member, a colleague or a professional.
-  **3** List at least one name beside each minor **TASK**. You can use the Resources section of this tool to find organizations that can also help.
-  **4** Take notes of any documents you need and create a document checklist for future use.

5. Get your plan on a calendar

Everything takes up time. When you've got lots to do, it's easy to feel overwhelmed.

1 Create a task calendar for yourself so that you can plan when you want to work on each task. This will help you decide what tasks are most important and will be a visual reminder of where you are in the planning process. Review it weekly.



2 We tend to keep our word much better with others than ourselves. **Share your calendar with a "Planning Partner"**, and set dates with them to check-in on your progress. This is someone close to you, such as a friend or family member, who can help you stay on track and make sure you get it done.



6. Remember, you don't have to become an expert

If you need additional support, look at the Resources section of this tool or call **Plan Institute's Toll Free Disability Planning Helpline** at

1-844-311-7526



Plan
Institute

MINOR TASKS BY WEEK

Week of	Minor Task(s) To Do	✓	Who Can Help?
MONDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
TUESDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
WEDNESDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
THURSDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
FRIDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
SATURDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____
SUNDAY <hr/> Month, Day	1. _____ 2. _____ 3. _____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. _____ 2. _____ 3. _____

