



Date	Thursday October 16, 2025
Time	7:00 PM EST
Location	Zoom

Topics	
1	Welcome
	Welcome by Heather Moxley. A special welcome to all the new to Perley Health Family members.
2	What Every Executor and Attorney for Property and Personal Care Should Know
	1. Dylan McGuinty, Jr., Mann Lawyers, joined us for the first half hour. He is also a family member of a Perley Health resident. 2. Dylan provided an overview of the characteristics of Power of Attorney (POA) statements. There are two key types of POAs – for Personal Care and for Property. The two do not have to have the same names, but it should be recognized that on occasion there is a cross impact – for instance if a medical assistance item as identified by the POA for Personal Care needs to be purchased with funds being managed by the POA for Property. 3. POA for Property – need to look ahead and as a rule of thumb have a plan/budget to support the person until they are 105. Accountants and tax experts would support this planning. 4. Appointment options – i. Primary POA, with a substitute named should the primary not be willing or able to perform the role. ii. Joint – more than one person is named and they will need to agree on all decisions needed to manage the POA. It is also possible to name a “tie-breaker” in the case that the two POAs do not agree. iii. Joint and Several – again there are multiple POAs, and each can act alone. This is the most efficient format but it requires the highest level of trust. 5. Effective date – i. One model is to have the statement effective immediately, and open ended for time. This means that either the person who is the subject of the POA, and the POA can make decisions and take actions independently. This can be an efficient sharing of duties but requires trust amongst the participants.

	ii. Another model only becomes effective when the mental capacity of the person in care precludes them continuing with the function. In this case a letter from the physician or professional providing the care would be required to support the POA taking on the role. iii. It may be necessary for the person to have signed a release that allows the lawyer to release the document when it becomes effective. 6. Wills – an important document for handling the wealth from one generation to the next. It offers predictability. i. Executor – need to name who the executor will be and backup plans. ii. Document may provide direction in how properties and assets will be managed – appraisals, sales, shares amongst recipients. iii. It is recommended that the executor consult a lawyer to interpret the will and engage a financial planner to manage assets and funds until the final disbursements. An accountant would be able to support the variety of tax and estate tax returns that are required. 7. Questions – there were a few scenarios question asked and Dylan confirmed that he is unable to provide legal advice for specific situations and it is best to consult your own lawyer. 8. Dylan's contact information is: Dylan McGuinty Jr., Lawyer 613-369-0379 Dylan.McGuinty@mannlawyers.com
3	Innovation Advisory Committee Danielle Sinden, Director Perley Health Centre of Excellence provided an overview of some of the innovation projects that the Centre of Excellence has been engaged with and that have been rolled out within Perley Health – Powerpoint overview attached with these notes. The Centre of Excellence is setting up an Innovation Advisory Committee to focus on those types of ideas going forward. The COE is setting up the committee to have a wide variety of participants, and will include family members/Caregivers. The terms of reference for the committee is attached with these notes. Please contact Danny if you would like to discuss – 613-526-7170; extension 2424 dsinden@perleyhealth.ca
4	Management Update Tanya MacDonald, Director, Seniors Housing and Community Programs provided the Perley Health Management Update for the meeting. 1. Intergenerational Childcare Program – a joint program with Andrew Fleck Childcare. Broke ground on September 8 with local dignitaries present. Currently 21% complete, with an expected completion date

	in spring 2026. It will provide care for 49 infants and toddlers. The Perley Health staff will have first priority for the spaces. The Andrew Fleck team is working with the Perley Health team to design programs and opportunities for the children and the Perley Health community residents and tenants to participate together. 2. October 1 was National Seniors Day and the launch of the Active Living Centre for Seniors and Veterans. Many different programs and special events will be offered. The centre is open to all over 55. Tenants of Perley Health and those from the surrounding community are welcome. The program is membership based and there is a \$50 per year fee. 3. Focus groups on Caregiver needs – you may have noticed posters around the buildings about Focus groups looking at the needs of caregivers that are caring for those with Dementia. 4. Remembrance Day – on November 11th there will be a ceremony hosted in the cafeteria. It is an extremely well attended event and veterans will be able to bring one friend with them. The planning is well underway and residents and tenants have been approached about placing wreaths. Tanya's contact information: tmacdonald@perleyhealth.ca 613-526-7170; extension 2454
5	Wrap Up
	Thank you to all for attending and participating. Thank you to the three speakers who shared great information this evenings. Our next Family and Friends Council meeting will be November 20th at 7pm over Zoom. The key speaker will be Dan Dalton, Pharmacist. Please email us if there are any items you would like Dan to cover.