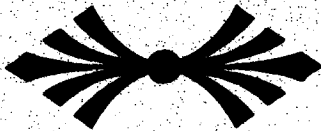


End of Life Planning

Putting My Affairs In Order



PERSONAL PLANS OF

(Print Name)

(Signature)



Commission on Aging
With special thanks to Martha and William Chovan

Diocese of Western North Carolina
900-B Centre Park Drive, Asheville, NC 28805
828-225-6656

First Edition, November 2002
Made possible by a grant from
the Justice and Outreach Ministries Group

Second Edition, April 2003
Underwritten by
Deerfield Episcopal Retirement Community

Permission granted to copy as needed, with proper credits.

Electronic copies available at www.episcopalsilverfoxes.org.



In Memory of
Ann C. Ring
St. John's Episcopal Church
Sylva, North Carolina



Forward

THIS BOOKLET ALONG WITH ITS CONFIDENTIAL MATERIAL, BELONGS TO

I AM A MEMBER OF THE FOLLOWING CHURCH



IN PREPARING THE BOOKLET

The Episcopal Book Of Common Prayer reminds us, "*in the midst of life we are in death.*" It seems fitting then to prepare for death as you prepare to live.

We suggest that you place this booklet in a 3-ring binder with pockets for additional materials. You can also purchase sheet and pocket inserts to include all pertinent documents within the binder. Work on this booklet from time to time, consider some reflective time, including readings on the topic of death and dying, and then write down things that will not change in black pen (otherwise use a pencil). When you need to make major changes, please note them on page 2. Consider placing a gum label over the information to be changed, with a new entry date, as well.

In brief, this booklet will help you to get everything in order. Be sure to tell others where you put it. In addition to placing a copy in your church, you may also wish to send copies to those who will need it. It is also a good idea to take a copy when you travel.

Initial preparation date _____

Received by _____
for safekeeping and use in case of need

Signature _____ Date _____

Personal Revisions & Additions

Date	Page #	Change made:

Notes

A series of horizontal lines for writing notes, with two binder holes on the left side.

Introduction

End of Life Planning: Putting My Affairs in Order has a place to record your wishes concerning funeral and/or memorial services, facts needed for an obituary and death certificate, and the location of your Will, Living Will, Advance Directives and other personal and legal papers for the orderly handling of your estate. To be sure that these things are available an 'End of Life Plan' document is needed, especially in a society where relatives live some distance away from you. Moreover this "End of Life Planning: Putting My Affairs in Order" booklet will allow you to keep some control of and manage your affairs up to the end of your life and to some extent, even beyond.



Purpose

The major purpose of the booklet is to help your family and your pastor to have some understanding of your personal wishes and essential knowledge about the fulfillment of your "End of Life Plans". If you need assistance in this effort, the clergy are ready on request to give you guidance. By preparing responses to the questions in the booklet now and then returning it to the confidential file in the church office, you will minimize the stress associated with making your decisions. Providing details about your personal goals will assure that the arrangements are in keeping with your wishes. If you wish later to make changes in your instructions, this booklet will be made available to you for that purpose.

Be sure to keep a copy for yourself and others (family, physician, attorney) as appropriate.

PERSONAL DATA

Full name: _____
last *first* *middle*

Address _____

City _____ State _____ Zip _____

Phone _____

Date of Birth _____ Place of Birth _____

Previous residences _____

Marital status _____ Maiden name _____

Wedding date _____

Spouse's name _____

Father's name _____

Mother's maiden name _____

U.S. citizen? Yes No Other than U.S.? _____

Military service: Yes No Branch _____

dates: from ____/____/____ to ____/____/____

serial number _____ Rank _____

Past or present occupation _____

Retired? Yes No Soc. Sec. # _____



SURVIVING IMMEDIATE FAMILY:

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

PLEASE CONTACT THE FOLLOWING IMMEDIATELY UPON MY DEATH:

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

Name _____ Relationship _____
Address _____
Phone _____ Email _____

PERSONAL/PROFESSIONAL RELATIONS

MY DOCTOR IS:

Name _____ Phone _____

Address _____

_____ Email _____

MY ATTORNEY IS:

Name _____ Phone _____

Address _____

_____ Email _____

MY BUSINESS OR PROFESSIONAL AFFILIATION IS:

Name _____ Phone _____

Address _____

_____ Email _____

MY EXECUTOR IS:

Name _____ Phone _____

Address _____

_____ Email _____

I have have not signed a Living Will.

I do do not wish to have Hospice care.

I have have not filed a Donor Statement with the Living Bank International (800/528-2971), Lifeshare of the Carolinas (800/932-4483) or other documents under the Uniform Anatomical Gift Act.

I have have not willed a portion(s) of my body for medical purposes. Please see page 12 for details.

My doctor, _____ and my attorney _____

have copies of the above mentioned documents and are fully aware of my wishes in this respect.

BIOGRAPHICAL NOTES

Work/career _____

Education _____

Community/volunteer/church activities _____

Accomplishments/awards/honors _____

Interests/hobbies _____

Favorite experiences/things that are important to me _____

Other items _____

I want something special in my obituary _____

I want do not want a photograph included in my obituary.

Please send a copy of my obituary to the following newspapers:

LOCATION OF PERSONAL & LEGAL PAPERS

1. Advanced Directives are available at _____ Hospital

Living Will _____

Durable Power of Attorney for Health Care _____

Durable Power of Attorney for Legal Affairs _____

Need to have with you or on file at the hospital.

2. Funeral Wishes

Funeral payment arrangements _____

Pre-purchased cemetery plot _____

Burial in church's Memorial Garden or Colombarium _____

Church Service _____

3. Tax files _____

4. Legal Instruments

Will _____

Organ donor card _____

Military discharge papers _____

Custody and care of children, if applicable _____

Social Security Information _____

5. Death Notification

List of relatives and friends to be notified _____

(To get a copy of death certificate, contact your local county or state health dept.)

6. Titles/Deeds/Leases

Home _____

Personal business _____

Other real estate _____

Auto/RV/Boat _____

Other _____

7. Trusts _____

8. Insurance Policies and Policy Numbers

Life _____

Health _____

Long-Term Care _____

Property _____

Employee/business _____

Union _____

9. Bank Accounts

Savings _____

Checking _____

Retirement benefits from employment _____

Who has access _____

Where are statements _____

10. Securities and Investments

Location of certificates _____

Other records _____

Name of broker(s) _____

11. Safe Deposit Box

Bank _____

Who has access _____

List of contents _____

Location of Key _____

12. Debts

I owe/mortgages _____

Owed to me _____

13. Other Instructions and Concerns

Care of Pets _____

FUNERAL ARRANGEMENTS

*"Give rest, O Christ, to your servant with your saints,
where sorrow and pain are no more,
neither sighing, but life everlasting."*

- The Book of Common Prayer



Funeral home preference _____
If you have none in mind, the Pastor can suggest several.

I have have not given instructions to the Funeral Home.
Advance consultation with a funeral home is especially helpful if remains are to be interred without cremation. Such consultations can be by phone or in person.

Funeral payment arrangements: _____

EVEN THOUGH I HAVE GIVEN INSTRUCTIONS TO A FUNERAL HOME, I AM COMPLETING THE BALANCE OF THIS BOOKLET TO ASSURE MY WISHES ARE KNOWN.

I wish provision be made at the funeral home for:

Visitation Yes No Viewing Yes No

*I am am not a veteran and am entitled to the American flag in lieu of the pall.
That is my desire.... yes no

Rings, clothing and other items to be buried with me _____

DISPOSITION OF THE BODY

"I am the resurrection and the life."

- John 11:25

EARTH BURIAL

I wish my remains to be buried not buried

CREMATION

I wish cremation..... As soon as possible..... Following the service.....

I do not wish cremation.....

I want this on my marker symbol _____
 decoration _____
 written _____

I wish to be buried in the church's Memorial Garden..... Yes No
I have have not already made arrangements.

I own a burial lot elsewhere..... Yes No
Here is the name and address of cemetery.

I wish another type of memorial. Here are the details:

I have Willed a portion of my body for medical purposes. Here are the details:

INSTRUCTION FOR BURIAL

"The liturgy for the dead is an Easter liturgy. It finds all its meaning in the resurrection. Because Jesus was raised from the dead, we too, shall be raised.

The Liturgy, therefore, is characterized by joy, in the certainty that 'neither death, nor life, nor angels, nor principalities, nor things present, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation, will be able to separate us from the love of God in Christ Jesus our Lord.'

This joy, however, does not make human grief un-Christian. The very love we have for each other in Christ brings deep sorrow when we are parted by death. Jesus himself wept at the grave of his friend. So, while we rejoice that one we love has entered into the nearer presence of our Lord, we sorrow in sympathy with those who mourn." *The Book of Common Prayer*, page 507.

(When possible, it is suggested that you fill out the following in consultation with your clergy.)

"The death of a member of the church should be reported as soon as possible to, and arrangements for the funeral should be made in consultation with, the Minister of the Congregation." *The Book of Common Prayer*, page 490.

Circumstance permitting, I wish my Burial Service to take place at:

_____ Church

Address _____ City _____

Celebrant _____

"Baptized Christians are properly buried from the church. The service should be held at a time when the congregation has the opportunity to be present." *The Book of Common Prayer*, page 490.

The service shall be "The Burial of the Dead" from *The Book of Common Prayer*: Rite I or Rite II

I request the Burial Office only to be read.

I request the Burial Office and Eucharist be done.

Suggested Pall Bearers: _____

If possible, I would like to have the following Psalms and Lessons (for suggestions, see *The Book of Common Prayer*, pages 494 ff.)

I would especially like the following hymns:

"The coffin is to be closed before the service, and it remains closed thereafter. It is appropriate that it be covered with a pall or other suitable covering." *The Book of Common Prayer*, page 490.

Note: Some parishes permit the use of a pall only, within the church building.

Policy regarding acceptance of flowers within the church buildings may vary. Instead of sending flowers, many prefer to make a more lasting memorial. Most parishes have both a general memorial fund and a building fund, as do most charities.

If you so desire, please indicate where you would like to have such contributions made:

I prefer to be

Buried

Cremated

Before or

after the funeral

Disposal of Ashes _____

Location of cemetery lot deed, crypt deed, columbarium contract _____

I have made arrangements to have certain parts of all of my body donated to _____

Funeral Home to use _____

Coffin specifications

Least expensive

Mid-range

Elaborate

I do/ do not wish to have my coffin open at the funeral home.

Other information for my survivors

Signature _____

Date _____

CHURCH SERVICE

"The liturgy for the dead is an Easter liturgy. It finds all its meaning in the Resurrection. Because Jesus was raised from the dead, we, too, shall be raised.

"The liturgy, therefore is characterized by joy, in the certainty that 'neither death nor life, nor angels, nor principalities, nor things to come, nor powers, nor height, nor depth, nor anything else in all creation, will be able to separate us from the love of God in Christ Jesus our Lord.'

"This joy, however, does not make human grief unchristian. The very love we have for each other in Christ brings deep sorrow when we are parted by death. Jesus himself wept at the grave of his friend. So, while we rejoice that one we love has entered into the nearer presence of our Lord, we sorrow in sympathy with those who mourn." - The Book of Common Prayer

Services Rite 1 Rite 2
Holy Eucharist Yes No
Order for the Burial of the Dead? Yes No
Organist? Yes No

Music Preference (i.e. Prelude, solo, Postlude) _____

I wish hymns be included in the service. Yes No

Here are my preferences: _____

Here are my preferences for the following readings:

Old Testament _____

Psalms _____

Epistle _____

Gospel _____

Instead of flowers, memorial contributions should be sent to:

Church Memorial Fund, OR Both, at donor's discretion

SPECIAL INSTRUCTIONS:

Lest these plans seem to pose an impossible burden on those who survive me, I affirm that they are guidelines only, to be followed as closely as possible, but within reason.



"Eye has not seen, ear has not heard, nor has it so much as dawned on man what God has prepared for those who love Him."

- 1 Corinthians 2:9

CLOSEST FRIENDS OR ASSOCIATES (Suggested Pallbearers):

YOUR WILL

"Let us with gladness present the offerings and oblations of our life and labor to the Lord."

- Book of Common Prayer



Every person of legal age and sound mind who owns property should have a Will, both husband and wife. No matter how much or how little you own, you need a Will. A Will insures that your estate will be distributed exactly as you desire after your death. A well-drawn Will provides tax advantages for your survivors. The tax laws are subject to change from time to time, and for maximum benefits one ought periodically to bring his estate plan and Will up to date. If you have not met with an attorney and/or tax counsel in the past five years for a review of your Will, you should not put off this most important task.

If you have not prepared a Will or if yours is ready for a five year review, you may want to think about these things:

- your family
- your church
- other charities

and discuss them with your pastor and your lawyer (separately or together).

Tax laws continue to change. Following are examples of forms a bequest might take. Be sure to see your attorney to arrange a specific bequest.

POSSIBLE INCLUSIONS IN YOUR WILL FOR A SPECIFIC PURPOSE.

FOR A SPECIFIC PURPOSE

I give and bequeath to _____ (name) a corporation duly organized and existing under the laws of the State of North Carolina, the sum of \$ _____ dollars for its Endowment Fund, to which may be added,

"As a memorial to _____"



NAMING A RESIDUARY LEGATEE

All the rest, residue, and remainder of my estate, real and personal, of which I shall die seized or possessed or to which I shall be entitled at the time of my death, I give, devise, and bequeath to _____ (name), a corporation duly organized and existing under the law of the State of North Carolina, for its corporate purposes.



FOR A SPECIFIC SUM

I give and bequeath to _____ (name) a corporation duly organized and existing under the laws of the State of North Carolina, the sum of \$ _____ dollars, for its corporate purposes.

YOUR ATTORNEY IS THE PERSON TO HELP YOU PREPARE THE FORM YOUR BEQUESTS MIGHT TAKE.

SOME RELATED READINGS

Albom, Mitch. *Tuesdays with Morrie*. An old man, a young man and life's greatest lesson. Doubleday, NY. This is a deeply moving account of courage and wisdom, shared by an extraordinary mentor looking into the multidimensional aspects of his own death.

Beauvoir, Simone De. *A Very Easy Death*. Pantheon Books, NY. This account of her mother's death in France is a deeply moving description of a proud woman's humiliation and the conflicting love and hostility her famous daughter experienced in confronting her mother's death.

The Burial of the Dead. Morehouse Publishing, Harrisburg, PA Pew Edition. It combines The Burial of the Dead service together with the Service of Holy Eucharist according to Rites I and II.

Holdorph, II, Jedediah D. *Planning a Funeral Service*. Morehouse, Harrisburg, PA. In a concise and clear format, this simple guide helps clergy and mourners plan an Episcopal funeral. It includes suggested readings for a funeral, along with some background on each reading. There is also a tear-out form for jotting down preferences. It can be used with Rites I or II.

Irion, P.E. *Cremation*. Fortress Press, Philadelphia. Irion is a prolific writer in the pastoral field, with emphasis on bereavement ministry. *Cremation* was written to encourage persons to select and plan the funeral practice of their choice.

Lewis, C. S. *A Grief Observed*. Bantam Books, NY. This honest observation of a widower's grief was written informally in odd notebooks, without plans for publication, as a means of self-therapy during Lewis' first year alone.

Wills Awareness Kit. The Episcopal Foundation, New York, NY. This resource gives a comprehensive overview of the issues to be considered when making a will and finalizing details of an estate. It is especially designed so that parishes can individualize them by adding the church's name and address.

Morgan, Richard. *Remembering Your Story: Creating Your Own Spiritual Autobiography*. Revised Edition. Upper Room Books, Nashville. This guidebook helps people to remember and record their life stories so that they can pass along a legacy to future generations. The book (and accompanying leader's guide) includes questions and exercises which can be used either by individuals or small groups. It includes guidelines for creating an Ethical Will.

Riemer, Jack and Nathaniel Stampfer. *So That Your Values Live On: Ethical Wills and How to Prepare Them*. Jewish Lights Publishing, Woodstock, Vermont. This book shows how to prepare an "ethical will" and provides examples of ethical wills written by 100 famous and ordinary people.

For additional reading resources, please see www.episcopalsilverfoxes.org.

GLOSSARY

BODY DONATION. An arrangement made with an institution (usually, a medical school) by persons who wish to donate their bodies for teaching or research purposes. The elements that remain are usually returned to the next of kin for disposition.

CREMATION AND REMAINS. A process which involves placing the body in a container and reducing its size through the application of intense heat or fire. Cremation reduces the body to cremains, another word for ashes. The ashes may then be scattered or placed in an urn. The urn may be kept by the bereaved, buried in the ground, or placed in a niche. In North Carolina a body must be held for 24 hours and a signed death certificate must be obtained before cremation. Embalming is not required. (See embalming below.)

DEATH CERTIFICATE. A required legal document completed by a coroner, it includes cause of death. It is filled out by a coroner, usually a physician, or a medical examiner. To secure a copy of a death certificate in North Carolina, contact your local county or state health department.

DURABLE POWER OF ATTORNEY FOR MEDICAL CARE. The transfer of legal authority to an individual who will make medical care decisions for an individual who, at the time, is unable to make such decisions.

EMBALMING. It involves the removal of blood and other fluids from a body and their replacement with preservatives that help to retard decomposition.

ETHICAL WILL. A series of affirmations which pass on the values and insights that have guided one's life.

LIVING WILL AND ADVANCED DIRECTIVE. There are two types of wills. A Living Will is the basic type of directive which requests that no aggressive treatment be attempted if the person is in the last or end phase of life. The Advanced Directive is a document that specifies the type of medical care a person wishes to receive when incapable of expressing his/her wishes in an end-of-life phase.

MEMORIAL SERVICES. A funeral service conducted usually without the presence of the body and held, according to the wishes of the family, sometime after a loved one's death.

PREPLANNING FUNERALS OR PRE-NEED PLANS. A plan offered by most funeral homes as a way to design a specific funeral service; it is often paid in advance of the death.

PROBATE. The procedure of administering the functions associated with the will, especially the distribution of property; it has to do with establishing or verifying the legitimacy of a will. Probate courts oversee the executor or administrator who is in charge of carrying out the wishes of the deceased.

VISITATIONS OR VIEWING THE BODY. A time for relatives and friends of the deceased to view the body and pay their respects to the bereaved. In Western society, the casket containing the body is often open.

CHECKLIST FOR SURVIVORS

- 1. Notify medical examiner or coroner and/or funeral director
- 2. Decide on time and place of funeral/memorial service
- 3. Submit obituary with time and place of service to papers
- 4. Notify personal friends and relations
- 5. Keep record of calls, visits, food, offers of help (i.e., how friends assist)
- 6. Arrange for visiting relatives
- 7. Review routine for children, food, pet care
- 8. Notify insurance companies, Medicare and Social Security
- 9. Notify executor or attorney
- 10. Check debts/payments due
- 11. Deal with utilities, post office, yard or household help
- 12. Cancel subscriptions, newspaper, e-mail, credit cards
- 13. Recycle medical devices (glasses, walker, hearing aids...)
- 14. Other: Additional Notes
