

A FINAL NOTE

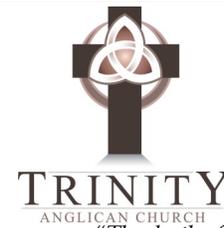
Every person of legal age and sound mind who owns property should have a will or a Living Trust which disposes of one's estate.

No matter how much or how little you own, you need a will or a Living Trust. These instruments insure that your estate will be distributed exactly as you desire after your death. They also provide tax advantages for your estate and for your survivors. Congress has authorized many tax advantages for those who wish to arrange their affairs so that the Church and other charities may benefit in the years to come. The tax laws are subject to change from time to time, and for maximum benefits one ought periodically to bring his estate plan and related instruments up to date. If you have not met with your attorney or tax counsel in the past five (5) years for a review of your estate plan, you should not put off this important task.

For many their first obligation, of course, is to remember those they love, but provision should also be made for the family of God, the Church. Even a small bequest will still be working for years and years to come.

The future growth and stability of God's work could be assisted by people who will leave a part of their estate. Gifts may be directed to specific purposes or they can be left to the discretion of the Vestry. Your wishes will be followed. This is an excellent opportunity to continue your participation in the future development of your Church.

Many persons leave all or a portion of estates in trust for one or more members of their immediate families, with the remainder or some part of it eventually going to the church. There are also ways to increase your present spendable income and at the same time help the Church. Some find tax advantages in deeding their homes to the Church while they are still living, reserving the right to occupy them during their lifetimes. Still others have set up life income agreements, or made arrangements to remember the Church by life insurance policies. We would be glad to sit down with you and your attorney to discuss these benefits at any time.



A Tool Kit for End of Life Planning

"The death of a member of the church should be reported as soon as possible and arrangements for the funeral should be made in consultation with the Minister of the Congregation."

The purpose of this booklet is to help your family and your Rector by recording your personal wishes and providing essential information. If you want assistance in this work of love, the rector is ready on request to give you spiritual and experienced guidance. Remember, by answering the questions now and returning the booklet to the confidential file in the church office, you will simplify decisions and details for your family and give them assurance that arrangements are in accord with your desires. If you wish later to make changes in your instructions, this booklet will be available to you for that purpose.

The Book of Common Prayer reminds us, "In the midst of life we are in death". It is fitting to prepare for death, even as we pray for grace to make our lives worthy of the immortal life Christ has promised to those who believe in Him.

*Now, please turn the page
and give us some basic
information.....*

BASIC INFORMATION

In St. Paul's Epistle to the Romans he writes that nothing, not even death, "shall be able to separate us from the love of God, which is in Christ Jesus our Lord."

First Name Middle Name Last Name

Address

City State Zip Code Phone

Single Married Divorced Widowed

Spouse Name (if applicable)

Occupation (past or present) Retired

***If a Veteran** _____
Branch of Service and Serial Number

Family Contact #1 _____
Name Relation

Phone Email

Family Contact #2 _____
Name Relation

Phone Email

**Please insert a loose photo-copy of your military discharge in the back of this booklet. It will expedite claims for Veterans Death Benefits.*

OPTION 2

[Full name], [age], passed away on [day, month, year] at [his/her home, name of hospital, other location] in [city, state]. [He/she] was born on [month, day, year] in [city, state] to [father first name] and [mother first name] ([mother maiden name]) [parent's last name].

[First name] grew up in [city, state]. [He/she] graduated from [name of high school] in [city, state] in [grad year]. After high school he/she *(include all that apply)*:

- attended [college/university/trade school] at [name of school] in [city, state] where [he/she] received a [degree/diploma/certificate] in [achievement].
- joined the [branch of military] in [year] and server for [#] years. [He/she] served in [war, etc.] and was the recipient of [medals, awards, etc.]. [He/she] was [discharged, retired, etc.] in [year], achieving the rank of [rank].
- began work for [company name] as a [occupation] where [he/she] worked for [#] years. *(Include as many jobs as you like)* [He/she] retired in [year] after [#] years.

[First name] married [spouse's name] in [year] in [city, state]. They were happily married for [#] years. [First name] was a member of [fraternity/sorority, church, charity, etc.]. [He/she] enjoyed [list hobbies and interests]. [He/she] also received [awards and accomplishments].

[First name] was preceded in death by [his/her] [names of parents, siblings, children, etc.].

[First name] is survived by [his/her] spouse [first name] of [city, state]; [his/her] [sons/daughters] [first name of child, child's spouse name in parenthesis, last name] of [child's city, state]; [his/her] [brothers/sisters] [first name of sibling, sibling's spouse name in parenthesis, last name] of [sibling's city, state]; [his/her] grandchildren [grandchild's name]; [his/her] great-grandchildren [great-grandchild's name]; and [his/her] nieces and nephews and other relatives.

A memorial service will be held at [funeral home name] [address] at [time, date]. A visitation will be held at [chapel or funeral home name] [address] at [time, date]. The family will be greeting friends and relatives at [time, date]. Burial will follow at [name of cemetery].

In lieu of flowers the family requests memorial donations be made to [organization name, mailing address]. Condolences may be left on [full name's] online guest book at [website URL].

BURIAL ARRANGEMENTS

The French philosopher, La Rochefoucaud, once wrote: "Death is like the sun; no one can look at it directly. This might be true, but if we never look at it even indirectly, then death will take us by surprise."

I am:

Baptized Confirmed A Communicant

If you are a non-Christian, or not affiliated with a church, what are your desires for your funeral service? _____

Do you want to be cremated or buried? Please check the one you wish:

Cremated Buried Buried with body present at service

If you have a Mortuary / Funeral Director you prefer, please indicate here:

Please check you preferences for your preferred Anglican Burial Service:

Eucharistic Service

My preferred Eucharistic Prayer is: _____

Hymns or Music: _____

My special desires regarding flowers are: _____

I have the following preferred readings (See BCP pp. 494-495 for suggestions)

Old Testament: _____ Reader: _____

(Note: Readers can be a relative, friend or clergy)

Psalm: _____ Reader: _____

New Testament: _____ Reader _____

Gospel: _____ Read by Clergy

Do you desire time for special remembrances from family and friends?

Yes No At their discretion

- ✦ Children (in order of date of birth, and their spouses)
- ✦ Grandchildren
- ✦ Great-grandchildren
- ✦ Great-great-grandchildren
- ✦ Parents
- ✦ Grandparents
- ✦ Siblings (in order of date of birth)
- ✦ Others, such as nephews, nieces, cousins, in-laws
- ✦ Friends
- ✦ Pets (if appropriate)
- Predeceased by (and date of death):
- ✦ Spouse
- ✦ Children (in order of date of birth)
- ✦ Grandchildren
- ✦ Siblings (in order of date of birth)
- ✦ Others, such as nephews, nieces, cousins, in-laws
- ✦ Pets (if appropriate)

● SERVICE

- Day, date, time, place
- Name of officiant, pallbearers, honorary pallbearers, other information
- Visitation information if applicable: day, date, time, place
- Reception information if applicable: day, date, time, place
- Other memorial, vigil, or graveside services if applicable: day, date, time, place
- Place of interment
- Name of funeral home in charge of arrangements
- Where to call for more information (even if no service planned)

● END

- Memorial funds established
- Memorial donation suggestions, including addresses
- Thank you to people, groups, or institutions
- Quotation or poem
- Three words that sum up the life

OBITUARY GUIDELINES AND SUGGESTIONS

The following headings are meant as a general guide. Make sure that you have considered everything that is usually covered, then select what you would like to include, and also decide what order you would like to use.

- NAME / ANNOUNCEMENT
 - Full name of the deceased, including nickname, if any
 - Age at death
 - Residence (for example, the name of the city) at death
 - Day and date of death (remember to include the year)
 - Place of death
 - Cause of death
- LIFE
 - Date of birth
 - Place of birth
 - Names of parents
 - Childhood: siblings, stories, schools, friends
 - Marriage(s): date of, place, name of spouse
 - Education: school, college, university and other
 - Designations, awards, and other recognition
 - Employment: jobs, activities, stories, colleagues, satisfactions, promotions, union activities, frustrations
 - Military service
 - Places of residence
 - Hobbies, sports, interests, activities, and other enjoyment
 - Charitable, religious, fraternal, political, and other affiliations; positions held
 - Achievements
 - Disappointments
 - Unusual attributes, humor, other stories
- FAMILY
 - Survived by (and place of residence):
 - ✦ Spouse

Do you desire graveside services?

- Yes No Family only

What cemetery do you prefer?

- Any This one: _____

What are your preferences for any reception following the service?

- None At church
- Other: _____

Will you want any other organization to participate in the service?

- Military Honor Guard Professional Organization
- Other: _____

Do you have any donation / memorial desires and instructions?

- None Yes: _____

If applicable, do you have pall bearers in mind?

- No Yes: _____
- _____
- _____
- _____
- _____

Do you have a plot or niche?

- No Yes: _____

The Christian faith offers to all the gift and promise of eternal life with God. Such life is possible for us when we live by faith in Jesus – the One who lived, died and rose again for us.

*"Now we see through a glass darkly, as in a mirror;
then we shall see face to face"
1 Corinthians 13:12*

Do you have any of the following documents?

- | | | |
|---|---|---|
| <input type="checkbox"/> Hand-written will | <input type="checkbox"/> Living trust | <input type="checkbox"/> DNR (Do not resuscitate) |
| <input type="checkbox"/> Attorney-drafted will | <input type="checkbox"/> Advanced directive | <input type="checkbox"/> Life insurance |
| <input type="checkbox"/> Another source of a will | <input type="checkbox"/> Military DD-214 | <input type="checkbox"/> Long-term care insurance |
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Marriage Certificate | <input type="checkbox"/> Medicare Supplement |
| <input type="checkbox"/> Pre-paid burial Arrangements | <input type="checkbox"/> social security card | <input type="checkbox"/> Divorce decree |
| <input type="checkbox"/> Passport | <input type="checkbox"/> location of safe deposit key | <input type="checkbox"/> Naturalization Papers |
| <input type="checkbox"/> Power of Attorney | <input type="checkbox"/> Car pink slip | |
| <input type="checkbox"/> Other documents: _____ | | |

Where are these documents stored?

- | | |
|--|--|
| <input type="checkbox"/> In a file folder in my desk | <input type="checkbox"/> In our safe deposit box |
| <input type="checkbox"/> In freezer/fridge (where EMTs may look first) | <input type="checkbox"/> Other: _____ |

Do you have a preferred Hospice Service?

- | | |
|-----------------------------|-------------------------------------|
| <input type="checkbox"/> No | <input type="checkbox"/> Yes: _____ |
|-----------------------------|-------------------------------------|

*"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*

Please identify the following, as applicable:

- Doctor: _____
- Estate planning attorney: _____
- Accountant/CPA: _____
- Life/health insurance agent _____
- Executor(s): _____

Helpful Links:

Advance Directive

<https://oag.ca.gov/sites/all/files/agweb/pdfs/consumers/ProbateCodeAdvancedHealthCareDirectiveForm-fillable.pdf>

POLST Form

<http://capolst.org/>

Additional Comments, if any: