

Planning For Death

I. INTRODUCTION

A. Purpose of Presentation

1. I have had many relatives and friends die before preparing various documents, guidelines, and preferences for their loved ones which created unusual discomfort, confusion, emotional stress and physical strain which could have been avoided.
2. When people die, there are over 80 some decisions that need to be made by the next of kin. A loved one is not in a state of mind to deal with these issues and that is something we can do. One of the most compassionate and thoughtful things we can do for loved ones is prepare for our death.
3. Examples of a few of my personal situations involving close relatives and friends:

a) Relatives

(1) Stepfather's Death

(2) Father-in-law's Death

(3) Brother-in-law's Death

(4) Mother's Death

b) Friends

(1) David Dickerson's Death

(2) Died after OCS Class Reunion in Myrtle Beach, SC.

(3) His widow Patti was completely distraught, confused, and unprepared.

(4) She didn't drive and had no idea of what a DD Form 214 was or where it was located.

B. Topics to Be Covered

1. Legal Documents/ Software
2. Funeral/Burial Services
3. Burial Policies

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4. VA Benefits
5. Hospice
6. Checklists

II. Presentation

A. Life and Death Documents Notebook

1. Purpose
 - a) *Contains Essential Documents*
 - b) *Mobile/Easily Removed During Emergencies*
2. Contents (See example)

B. Legal Documents

1. Will
2. Living Trust
3. Pour Over Will
4. Durable Power of Attorney versus Power of Attorney
5. Living Will
6. Do Not Resuscitate Directive
7. Organ Donor Directives
8. My Birth Certificate
9. Spouse's Birth Certificates
10. Children's Birth Certificates
11. Marriage Certificates
12. Divorce Decrees
13. Death Certificates
14. Military Discharge Papers

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- a) DD Form 214 as Enlisted Man (prior to OCS)*
- b) DD Form 214 as Officer (from date of commission)*

15. Copy of Social Security Card
16. Burial Instructions
17. Life Insurance Policies
18. Health Insurance Policies
19. Disability Insurance Policies
20. Long Term Care Policies
21. Burial Insurance Policies
22. Retirement Plan Documents
23. Schedule of Assets
24. Recommendations to My Spouse
25. My Obituary (write your own- only you know all the facts)
26. VA Benefits/Resources Contact Information
27. Software Programs
 - a) Quicken WillMaker (see attachment)*
 - b) User Friendly, Forms by State*

C. Funeral/Burial Services

1. Remains Disposition
 - a) Burial or Cremation*
2. Funeral Services
 - a) Traditional*
 - (1) Chapel/Church Services
 - (2) Gravesite Burial
 - b) Celebration of Life*

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- (1) Gravesite Burial
- (2) Celebration of Life
 - (a) *Photo Board/Videos/*
 - (b) *Testimonials*
 - (c) *Standing Round of Applause*

D. Burial Policies- pro or con

E. VA Benefits

1. Burial Plot
2. Headstone
3. Flag
4. Honor Guard/Pallbearers
5. Burial Expense

F. Hospice

G. Resources

1. VA
2. American Legion

III. Summary

- A. Start Planning Today.**
- B. Prepare a 3-ring Notebook containing Life and Death Documents.**
- C. Prepare/update legal documents and file them in your Notebook.**
- D. Show and review Life & Death Documents notebook with Spouse & Children.**
- E. Store notebook in a safe place where loved ones know its location.**
- F. Review and update notebook on an annual basis.**

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DON'T GET CAUGHT DEAD AND UNPREPARED! TAKE IMMEDIATE ACTION TO PROTECT AND REDUCE THE TRAUMA YOUR LOVED ONES WILL GO THROUGH AT THE DEATH OF A LOVED ONE. THEY WILL LOVE YOU FOR SUCH A LOVING, CARING ACT ON YOUR PART FOR THEIR CONSIDERATION.