

## GETTING YOUR AFFAIRS IN ORDER

Death is one of life's certainties. When we die it falls to members of our family, friends, distant relatives, or to total strangers to plan our burials.

Planning such things when you are grieving is both hard and time-consuming. Often members of the surviving family live far apart and have never discussed these matters; when the time for planning comes they can have very different ideas about what the deceased person would have preferred or about what would be appropriate.

The best way to minimize conflict on these issues is to make your own plans. It is a very thoughtful gift both to your family and to yourself. In essence, you leave a form saying, "This is what I prefer."

Before planning the service<sup>1</sup>, with its many options, it will be helpful to your family if you provide certain preliminary information:

1. Do you wish to be buried in a casket? \_\_\_\_\_
2. Do you prefer to be cremated? \_\_\_\_\_
3. Where do you wish to be buried? \_\_\_\_\_
4. Who should be notified of your death? \_\_\_\_\_

(In addition to family and friends, list Social Security, pension funds, especially military pension funds, insurance companies, organizations, school and colleges, professional associations, and other associations known only to you.)

5. Are you entitled to military honors? \_\_\_\_\_
6. Are you eligible for burial in Arlington or any other national cemetery? \_\_\_\_\_
7. If so, where are your discharge papers? \_\_\_\_\_
8. If you own a burial site, where is the deed? \_\_\_\_\_
9. Whom do you wish to conduct the funeral? \_\_\_\_\_
10. Who should be invited to speak about you? \_\_\_\_\_
11. Is there anyone who should not be invited to participate or to attend? \_\_\_\_\_
12. Have you made a will or created a revocable trust? \_\_\_\_\_
13. Does your will make prudent provisions for the well-being of family, with clear directions about the guardianship of any minor children, and the arrangements for their nurture and education? \_\_\_\_\_  
\_\_\_\_\_
14. Does your will or trust leave bequests for charitable purposes, and particularly for the church? \_\_\_\_\_  
\_\_\_\_\_

<sup>1</sup>Note: St. John's has a pamphlet titled "How I Would Like to be Remembered: A Gift to My Family and Friends," which will assist you to select the type of funeral service you would prefer.

15. Where are your will and other important papers? \_\_\_\_\_
16. Where is your lock-box and where is the key? \_\_\_\_\_
17. Where is your passport? \_\_\_\_\_
18. Do you have valuable papers that need to be kept? \_\_\_\_\_  
Where are they? \_\_\_\_\_  
What are they? \_\_\_\_\_
19. Where are bank books, stock certificates, titles and deeds of ownership? \_\_\_\_\_  
\_\_\_\_\_
20. Have you compiled a list of valuable things and their proposed recipients apart from your will? \_\_\_\_\_ Where is the list? \_\_\_\_\_
21. Whom have you designated as your executor?<sup>2</sup> \_\_\_\_\_
22. Does anyone have any outstanding obligations to you about which your family or executor<sup>3</sup> should be aware? \_\_\_\_\_
23. Who has power of attorney? \_\_\_\_\_
24. Who has your healthcare power of attorney? \_\_\_\_\_
25. Do you have a living will or other written instruction regarding end of life issues? \_\_\_\_\_  
Where is it? \_\_\_\_\_  
Who has copies? \_\_\_\_\_
26. Do you own property of which others may not be aware? \_\_\_\_\_  
Where is it? \_\_\_\_\_
27. Do you have partnerships in properties or business of which others may not aware? \_\_\_\_\_ Where are the corporate offices? \_\_\_\_\_
28. Do you have death benefits of which others may not be aware? \_\_\_\_\_
29. Who is your funeral director? \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

Document courtesy of The Reverend Phillip C. Cato, Ph.D. [phillipcato@yahoo.com](mailto:phillipcato@yahoo.com)<sup>4</sup>

<sup>2</sup>Or Executrix

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<sup>4</sup>Note: Much personal data these days is contained on computers and cell phones. If this is true of you, we suggest you make sure that heirs can find your password or other information needed to access information you believe that they will need.