Keeping It Together

Information Organized for



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www.SeniorServicesMidland.org

BEFORE YOU BEGIN!

- Read the entire manual.
- Make <u>extra copies</u> of pages, such as those for health history, finances, and treasures. You may want to have a complete clean copy for planned updates.
- When completing a form, please **print** so it will be easy for others to read.
- <u>Store</u> the manual in a location that can be accessed by a trusted family member.
- **Review** and update the manual every six to twelve months.
- Copies of important documents can be placed in <u>plastic sleeves</u> and stored in this manual. Plastic sleeves can be purchased at office supply stores.
- There may be <u>more</u> documentation needed for your situation that is not currently in this manual. Since each person's circumstances are different, add pages as needed.
- <u>IMPORTANT</u>: A manual will contain important personal and financial information. To <u>protect</u> you from identity theft, keep this manual in a locked or secured location.
- <u>Electronic Version</u>: Use the <u>tab key</u> or your <u>mouse</u> to move from one answer to the next.

SENIOR SERVICES
Embrace Your Age

Keeping It Together

We all have important paperwork and personal information...details ...papers...decisions...how do we sort it all out? How do you start conversations on tough topics like finances, end of life planning or who gets the "Family Treasures?" The goal of "Keeping It Together" is to help families come together now and start planning for the future.

This manual is not a "one-size-fits-all" idea as you may have other important information in your life that should be included. We hope that by having your important documents and information in one place, it will be easier for those dealing with your estate and final arrangements.

The idea for the "Get It Together" manual came from Rev. Myrna Long Wheeler with contributions from the following:

- 1. The Rev. Elizabeth G. Rowan's "Keeping Track of What Counts" binder helping a person develop a filing system for their personal household documents.
- 2. Barbara Arn, a Hillcrest resident, who helped developed a binder of information she calls, "To Make Death Easier" which pulled together the same type of material I have collected.

Rev. Myrna Long Wheeler, Chaplain Hillcrest Retirement Community, (909) 392-4354 March 2008; Revised June 2008Senior Services, Midland County Council on Aging, contributed to this project by updating and expanding the original information.

Revised April 2009; May 2010

Life offers two great gifts--time, and the ability to choose how we spend it. Planning is a process of choosing among those many options. If we do not choose to plan, then we choose to have others plan for us. Richard I. Winword



This manual provides a system for structuring and easily organizing your information for:

	Pages
Health History	5-8
Insurance Policies and Benefits	9-10
Residence/Property	11-12
Automobile and Other Vehicles	13
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Bank Accounts	15
Credit/Debit Cards	16
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For every minute spent in organizing, an hour is earned. Author Unknown



Physicians		
Name	Phone	
Address		
Diagnosis and date	Sity	State
Treatment		
Surgery		
Hospital		
Name	Phone	
Address		Ctoto
Diagnosis and date	- 7	State
Treatment		
Surgery		
Hospital		
Name	Phone	
Address		
Diagnosis and date	,	State
Treatment		
Surgery		
Hospital	Date	
Name	Phone	
Address		
Address Street Diagnosis and date	City	State
Treatment		
Surgery		
<u> </u>		

Hospital ______Date _____



Do you have a record of your immunizations? Yes No

If yes, put a copy in this manual.

	Type of Vaccine	Date	Health Professional or Clinic	Date next dose is due
Chickenpox (Varicella)				
Нер А				
Hepatitis B				
Influenza				
Measles, Mumps, Rubella (MMR)				
Pneumococcal				
Shingles (Zoster)				
Tetanus, Diphtheria				
Other				



Allergies	Reaction	Medication
Asthma		
Chemicals		
Food		
Medications		
Pets		
Seasonal		
Skin		
Stings		

Pharmacies

Pharmacy	Address	Phone	Accepts Your Insurance
Local:			Yes No
Local:			Yes No
Mail Order:			Yes No
Compounding:*			Yes No
Other:			Yes No

^{*}Compounding is the process of mixing drugs by a pharmacist or physician to fit the unique needs of a patient.



HEALTH HISTORY Page 4 of 4

List below all prescription and over-the-counter medicines including: vitamins or other nutritional supplements, pain relievers, antacids, laxatives and herbal remedies. Add new medicines when you start taking them and fill in the date when a medication is stopped.

Name of Medication	Physician Prescribing Medication	Purpose or Reason Taken	Dose, Time(s) of Day, Frequency	Where is Medication Kept	Date Medication Stopped	Special Instructions



Policies and Benefits	Company Name & Phone	Account Number	Policy Amount	Located	Comments
Life					
Health					
Dental					
Vision					
Medicare					



Policies and Benefits	Company Name & Phone	Account Number	Policy Amount	Located	Comments
Medicare D					
Supplemental					
Cancer					
Long Term Care					
Disability					



Use one sheet for each reside	ence/property.		
Address			
Street		City	State
Property taxes in the amount	of \$	Due	
Parcel number (from property	rtax hill)		
r arear named (nam property	<u></u>		
Utility providers			
Power			
Gas/Propane			
Mortgage Lender			
Name			
Address			
Street		City	State
Phone			
Insurance Information			
Insurance Carrier			
Policy Number			
Phone			
Name of Agent/Agency			
Address of Agent/Agency			
0 0 ,	Street	City	State
Phone			
Location of file with more info	rmation or policie	es	
Location of photo disc/video of	of home possessi	ons	



Home Maintenance and Repairs

Item	Company	Address	Phone
Appliances			
Computer			
Furnace			
Housekeeping			
Lawn			
Plumbing			
Recycling			
Garbage			
etirement Communi	itv		,
Name of Retireme	nt Community		
Address			

ment Community		
Street	City	State
		<u> </u>

Year you moved in _______Monthly fee ______

Time Share(s)

Where is the file	located if n	ot included	in this	manual?

Location of Time Share(s)



AUTOMOBILE AND OTHER VEHICLES Use one sheet for each vehicle

Notify your Secretary of State, Department of Motor Vehicles of the owner's death.

Place the Title of ownership in this manual Vehicle Information

Year and Make		
Vehicle Identification Number		
Date purchased	License Number	
Legal owner, if not you		
	Name	
Street	City	State
Location of purchase papers _		
Insurance Information		
Insurance Carrier		
	Street	
	Street	
Phone	City	State
Location of policy		
Car Maintenance and Repairs		
Company		
Address		
Phone	City	State



FINANCIAL DATA

Include a statement of each source of financial data in this manual.

	Income Source	es .	Location of Files
Employment			
Pension			
401K			
Interest			
CD			
IRA			
Annuities			
	Preparer?		
		and State Income tax	State

Year	Location of Tax Returns



For each Bank ac	count incl	ude a state	ment in this manua	l.		
Type of account:	Savings	Checking	Money Market			
Other						
Account Number						
Name and addres	s of bank	or financial	institution			
Name						
	Street		City			State
Name(s) on the si				Donoficione	Vaa	Na
				Beneficiary Beneficiary		
If no, who is the						
Address	Street		City			State
Name						
	Street		City			State



CREDIT/DEBIT CARDS

Name

Place a copy of each credit card bill in this manual *and* any credit cards that you do not use.

Number

Expiration

Location

Debit/Credit card data

		date	(if not in this manual)
afe Deposit Box: Yes	. No	1	l
If yes, place a list of	everything that is in the b	ox in this man	ual.

Location of Safe Deposit Box

Location of Key

Approved to access Safe Deposit Box

Name ______Phone _____Phone



GOVERNMENT DOCUMENTS Social Security Number _____ Medicare Number Driver's License _____ Issuing State _____ Expiration Date _____ Passport _____ Issuing Country _____ Citizenship Certificates included in this manual Yes No_____ Birth Yes No _____ Adoption Yes No _____ Baptismal Yes No _____ Marriage Yes No _____ Divorce Military I. D. ______Discharge Date _____ DD-214/Discharge papers are needed for benefits. Add a copy to this manual.

Veteran Papers _____



Immigration/Citizenship papers

Do you have a will? Yes No

f yes, put a copy	y in this manual.		
Who has a copy	?		
Name			
	Street	City	 State
		·	
Name			
	Street		 State
Name			
	Street		 State
Phone			
Do you have an f yes, who?	Executor for your estate? Yes No		
Name			
Address	Street	City	 State
Phone			
Name			
Address	Street	City	 State
Phone			



TRUST

Do you have a trust? Yes No		
If yes, put a copy in this manual		
Where is the Trust held?		
Who is the Trustee?		
Name		
Address		State
Phone		
Who has copies of the Trust?		
Address	City	State
Phone		
Name		_
Address	City	Ctata
Phone	City	State
Family Attorney		
Address	City	State
Phone		



DURABLE POWER OF ATTORNEY

Have you nar	ned a Durable Power of Attorney?	Yes	No	
If yes, put a c	opy in this manual.			
Who is the DI	POA?			
Name				
Address _	Street		City	 State
Phone				

Release of Information

Give consent in advance for your doctor or lawyer to talk with your caregiver as needed. There may be questions about your care, a bill or a health insurance claim. Without your consent, your caregiver may not be able to get needed information. You can give your okay in advance to Medicare, a credit card company, your bank or your doctor. You may need to sign and return a form.

Even though it's your own spouse or parent, or sibling who's sick, some hospitals won't release any medical information because of HIPAA privacy regulations. It can also be difficult to deal with insurance companies or doctors' offices on someone else's behalf without a HIPAA release form.

Do you release forms for the following?

Bank	Yes	No
Credit Card(s)	Yes	No
Doctor	Yes	No
Hospital	Yes	No
Insurance Co.	Yes	No
modrance co.		
Lawyer	Yes	No

While you may sign a release form with a variety of entities, you are not always given a copy. Ask for a copy and then place it in this manual.



ADVANCED HEALTH CARE DIRECTIVE

Do you have an Advance Health Care Directive?* Yes No

Patient Advocate _____

Do you have a Health Care Durable Power of Attorney? Yes No (The Health Care Durable Power of Attorney and the Durable Power of Attorney on the previous page are different documents.)

If yes, put a copy of each in this manual.

Choose a person who will be able to follow your wishes when the decisions get tough.

Address			
Phone _	Street	City	State
Successor A	Advocate		
	Street	City	State
	Street	City	State
_	nes for Patient Advocate e authority to execute yo	without the legal paperwork doe	s not give the
IN CASE O		copy of this form should be readi	ily available to
Where is a o	copy located?		



MY LIFE STORY

Place in this manual or indicate where it can be found.	
Location	
Is there a recorded audio or video tape of your life story? Yes	No
Location	

Include things about

- Your early childhood memories of parents/grandparents
- Antics with siblings or close friends
- School days; Teachers that made an impact
- Pets
- Hobbies
- Chores
- Memberships/awards
- Incident in childhood/youth that impacted you
- College days
- Early jobs
- Employers
- Career
- Dating/marriage(s)
- Ex-spouses
- Children/family connections (or disconnections)
- Children's addresses
- Vacations
- Military or alternative service stories
- Religion how it played a part (or not) in your life
- Values Beliefs Goals in life
- Retirement
- Travel places you've most enjoyed
- Things you are most proud of...or have accomplished
- · Recognitions or honors received
- Groups/individuals supported
- Unusual happenings
- Family Tree



DISTRIBUTION OF THE "FAMILY TREASURES"

Item	Given to	Date
Item	Given to	Date



WHO SHOULD BE NOTIFIED

AUTHORITIES: If the death occurs outside of a hospital or nursing home you may need to notify authorities of the death. Call 911 or your local emergency number to report the death. The authorities will call the coroner. Although it may not actually be necessary to call the coroner, it is a good idea to do so, especially if the deceased had insurance policies.

FAMILY AND FRIENDS: List so notify others of the death:	ome key people to call and ask them to please
Name	Phone
List organizations/companies you your death:	have worked for who might like to know about
Name	Phone
Groups to which you belonged, i.e	e. bridge, book, church, Kiwanis, YMCA, etc:
Group	
Contact	
Group	
Contact	
Group	
Contact	Phone
Group	
Contact	Phone



VITAL STATISTICS FOR AN OBITUARY

Full Legal Name	_			
Legal Residence				
Dieth Data	Street	Noss	City	State
Birth Date	Birth F	City/Count	у	State
Death Date	Place _	City/Count		State
Cause of Death _			у	State
Mother*		Birth Place		
			City/County	State
Father		Birth Place	City/County	State
			, ,	
Children's Names	·			
Other Survivors _				
Education 1-12 _		College 1-4 c	or 5+	
Military				
Career				
Religious Affiliatio	n			
Alternate Residen	ce			

*Do not include mother's maiden name in an obituary as that data often is used as a password to account information.



I have made arrangements with	1:		
Name of Mortuary/Organization	ı		
Address			
Phone Street		City	State
Do you have a pre-paid burial p	olan? Yes No		
If yes, put a copy in this manua	I.		
Account Number			
Do you have pre-paid cemetery If yes, include a copy of the dee Are the costs for opening and c	ed or invoice in this r		t?
Yes No If no, there may be a			
My desire is to have the Casket	t: Open	Closed	
I prefer my body to be: Burie	ed Cremated	Donated	
My final "resting place" should be	oe		
(Earth burial, mausol	eum, ashes scattered at sen on my gravestone	•	
If a Veteran, are you eligible for	a marker plaque?	Yes No	
A memorial/funeral service sho	uld be planned by:		
Name	F	Phone	
Name	ŗ	Phone	



Favorite Hymns _____

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Special music o	or musicians I wol	uld like	
Flowers/flowering	ng plants I like		
Memorial contri	butions could be	designated for	
Address			
	Street	City	State
Name			
Address			
Phone	Street	City	State
Name			
Address			
Phone	Street	City	State
Name			
Address			
Phone	Street	City	State



Children

Some	people	using	this	may	have	children	under	age	18.	lf	SO,	it	is	VERY
import	ant to ha	ave ma	de p	lans f	or thei	r care.								

Do the children	have a legal guardian other than you? Yes No
If yes, who is the	ne legal guardian?
Name	Phone
Decide on a few children in the person/family to friends. Any fin person(s) name	Il the children live? w people/families that may be your top choices for raising your eventuality that something happens to you. Interview each o decide who would be the best fit. It may be family; it may be good al decision should be clear in your will with the support of the ed. Always take into consideration the importance of family sits if the person(s) chosen is not family.
Place Immuniz	ation records in this manual.
•	Emotional needs of each child
Special Hea	Ith/Emotional needs
Name	
	Ith/Emotional needs
Name of prima	ry doctor, phone number and address
	rs or documents that pertain to your child's future? Yes No e are they located?
Others persons	s who depend on me
<u>-</u>	s who depend on me Relation
	Relation
Pets	Relation
Name	Give to
Name	Give to



Caregiver for

Individual Pagnancible
Individual Responsible
T



Contact information for individu	als listed on previous pages	
Name	Name	
Address		
Phone	Phone	
Relationship	Relationship	
Name	Name	
Address		
Phone	Phone	
Relationship		
Name	Name	
Address	Address	
Phone	<u> </u>	
Relationship		
Name	Name	
Address		
Phone	Phone	
Relationship		
Name	Name	
Address	Address	
Phone	Phone	
Relationship		



APPENDIX

- A) Notes
- B) Biography of author
- C) Web Sites
- D) Letters
- E) Flowers for Funeral
- F) Donate Body to Science



NOTES APPENDIX: A



Reverend Myrna Long Wheeler was the Chaplain at Brethren Hillcrest Homes in LaVerne, California for eight years. As a single person herself, and seeing first-hand the anguish of some of her residents' family members when they had to find the documents needed after a relative's death, and also wondering what to do for a memorial service, she developed a tool for people to have peace of mind that their wishes will be carried out in a timely and easy manner.

Myrna passed away at age 70 on Jan. 9, 2010 at her home in San Dimas, California, following several months of struggle with acute myeloid leukemia. Until her illness in the last half of 2009, she was serving as chair of the Board for Pacific Southwest District of the Church of the Brethren, and as Chaplain for Brethren Hillcrest Homes in La Verne, California.

She was a graduate of the Training in Ministry program of Bethany Seminary; at age sixty was licensed to minister and ordained at age sixty-three. She was a part-time staff of the La Verne Church of the Brethren as minister to older adults.

In her volunteer service to the Church of the Brethren, Wheeler twice served as moderator of Pacific Southwest District. At the time of her illness she had been newly confirmed as an officer of the Ministers' Association. She mentored Training in Ministry students, served for 25 years as a member of the Board of Trustees of the University of La Verne, and was a member of the Older Adult Ministry Group. She was a longtime board member with the YWCA of Greater Pomona Valley and the American Association of University Women-Pomona Branch. Her honors include the Centennial Citation of Distinction in 1991 from the University of La Verne, being named ULV "Alumna of the Year" in 1993, and being selected a "Woman of Achievement" by the YWCA of Los Angeles, Orange, and San Bernardino Counties in 1995.

WEB SITES APPENDIX: C

Advance Directives and Living Wills:

- American Bar Association www.abanet.org 800-285-2221 (toll-free)
- Caring Connections (National Hospice and Palliative Care Organization) www.caringinfo.org 800-658-8898 (toll-free)
- Medlineplus.gov www.medlineplus.gov, go to: Advance Directives
- National Cancer Institute www.cancer.gov 800-422-6237 (toll-free)

Funeral Planning:

- www.funeralplanning101.com
- www.ftc.gov/bcp/edu/pubs/consumer/products/pro19.shtm

United Network for Organ Sharing:

www.unos.org

MidMichigan Health:

www.midmichigan.org

University of Michigan Health Center:

www.med.umich.edu



LETTERS APPENDIX: D

Children

On each child's birthday, why not write a letter sharing memories you will always carry of that child. Name the attributes that you love about each child. What are your hopes for each child? What have been favorite pastimes, teams, books, movies, friends, accomplishments this past year? Name what you would like your child to remember about you.

Other Family

Consider writing letters to other family members or friends to capture those special memories that you have shared.



APPENDIX: E1

There is no hard and fast rule about flower or plant selection for a funeral. Flowers are generally accepted as an appropriate way to comfort the grieving family. Occasionally, someone in the grieving family will have allergies to certain plants or flowers, so we advise you to ask a family member before ordering your selection. Remember to keep in mind that plants will need care after the funeral, and flowers will need to be disposed of by the family. Take some care in your flower selection to keep in mind the ultimate purpose of the gift -- that is, to comfort the loved ones and to honor the memory of the deceased.

CASKET SPRAYS

Casket sprays are flowers lain over the casket. These are usually ordered by the closest relatives of the deceased. In cases where the deceased has no close living relatives, friends or other family members may order the casket sprays. In hardship cases, where there are no living relatives and no pre-arrangements, a friend or business partner or other community organization may provide casket sprays.

VETERANS

Military personnel often have a flag placed on the casket. In this instance, if a casket spray has been ordered, it is usually displayed above and behind the portion of the casket draped with the flag. Flowers are NEVER placed on top of the flag, so if there is a casket spray in addition to the flag, feel free to display it over the scarf portion of the casket. In some cases, a properly folded flag will be placed in the casket with the deceased, allowing the casket sprays to be placed over the casket as usual.

FLORAL PIECES

Floral pieces from relatives are usually placed closest to the casket. Often, relatives choose matching baskets for each end of the casket, or standing sprays, floral hearts and pillows, wreaths, fireside baskets, and even rosaries. Specialty arrangements can be ordered, also.

SPECIALTY ARRANGEMENTS

Specialty arrangements include flowers with figurines or other items indicating a connection to the deceased. These options may be sent by relatives or friends and are often chosen by those who have shared a particular interest or pastime with the deceased. For example: using a sheaf of wheat in an arrangement for a farmer; or a ball of yarn and knitting needles for someone who liked to knit. Toys can be used for adults and children, alike. We know of instances where a semi-truck was used for a trucker who passed on, and a toy tugboat for a child. Almost anything can be incorporated into a floral arrangement, depending on the ability of your florist to accommodate them. You are limited only by your imagination.

LID ARRANGEMENTS

Lid arrangements are floral pieces placed inside the casket. These are often gifts from the children, grandchildren or someone especially close to the deceased. Generally, lid arrangements are in the form of satin pillows, hearts or crosses with roses on them. Hand bouquets, nosegays, corsages and/or boutonnières may be used. Always check with the immediate family before ordering an arrangement to be placed inside the casket.

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RESPECT FAMILY WISHES

Flowers may be sent regardless of a funeral notice requesting charitable donations "in lieu of flowers." However, there are times, especially with celebrities or someone who was quite popular in life, when the grieving family can be overwhelmed by the donation of large groups of flowers and plants. For example: when a prominent person dies, and the family has requested a charitable donation "in lieu of flowers," it is best to respect the family's wishes. If you feel compelled to send flowers, ask the florist how many pieces have already been sent or ordered, and make your decision from there.

Another reason for the "in lieu of flowers" wish is in the example of an entire family dying in a tragic accident. When there are several members of the same family being buried at the same time, it can become difficult for the funeral home to accommodate all the donations of flowers.

GROUP FLOWERS

Groups of people that might wish to send flowers include employees, co-workers, neighbors and colleagues. Ask for a group sympathy card from the florist. Special cards can be purchased and sent with the flowers, if you like. Formal associations such as the Masons, Loyal Order of the Moose or Eastern Star, have their own emblems and will want to have them represented.

IDENTIFICATION

Ask the florist to include a brief description of what flowers are in your arrangement, and who sent them, when you make your order. This will help the bereaved when it comes time to send out thank you cards. Some florists will automatically include this information, having learned from experience, but it doesn't hurt to ask anyway.

AFTER THE FUNERAL

Flowers may also be sent well after the funeral is over. Many people appreciate the kindness and thoughtfulness of those who attend the funeral to pay their respects, and then send a floral gift to the home sometime after the funeral to show they are still thinking of the family in their time of sorrow.

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APPENDIX: E2

Introduction

If you're just dying to get into medical school, you can always enroll later in life. Donating your body to science is the ultimate rare event - a once-in-a-lifetime opportunity to benefit medical teaching and research since the study of human anatomy does require a body.

Instructions

Step One

Preregister your donation with a local medical school or university. You'll be given a registration packet that covers policies and procedures; read it very carefully.

Step Two

Sign a consent form stating your desire to donate your body, and put a copy of it with your will and other personal documents. You won't be listed as a donor until a completed form has been returned and acknowledged. Cancel your decision at any time by notifying the medical school or university in writing.

Step Three

Arrange for the medical school or university to be notified when you die, so that your body can be properly transported and prepared. When your corpse is delivered to the medical institution, it will be embalmed and refrigerated until it's needed for study.

Step Four

Check with the school to see what its policies and procedures are regarding your body after it has been studied. Most institutions will respectfully cremate your remains at their expense and give your ashes to your loved ones. Don't expect to get paid for your donation pre or postmortem. By law, medical schools are not permitted to purchase anyone's body.

Step Five

Contact the United Network for Organ Sharing (www.unos.org), a national group that oversees organ transplantation procedures in this country, for more information on donating your body.

Step Six

Rest in peace? Perhaps not: Your spouse, adult children, siblings, parents and guardians can arrange to have your body donated after you die by filling out an after-death donor form. In the event that your body cannot be accepted, your family needs to make alternate plans for your disposal.

What to Look For

Medical school or university registration packet final disposition policy

Overall Tips & Warnings

The mistreatment of donated bodies is not uncommon. The Uniform Anatomical Gifts Act governs the donation of bodies for dissection, research and transplantation throughout the United States, but dead people can't file a complaint.

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