

END OF LIFE PLANNING

A FAITHFUL WALK THROUGH THE PLANNING PROCESS
OF YOUR LAST WISHES



Prepared by St. Peter's Episcopal Church

“The minister of the congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.”

--- The Book of Common Prayer, Page 445

The following documents are designed to help our parishioners navigate the process of planning for the end of their life, regardless of where they are in their life at the current time.

Thank you to the Episcopal Church Foundation for providing model documents for us to follow in the process of preparing these documents for our parishioners.

Thank you to Christopher Sherwood, Attorney at Law, for reviewing the documents for legal accuracy and for providing a link to medical directive documents. Thank you to caringinfo.org for allowing us to link to their site for the medical directive documents.

These documents are provided free of charge to St. Peter’s parishioners and may not be sold or copyrighted.

St. Peter’s Episcopal Church

1 S. Tschirgi St.

Sheridan, WY 82801

Tel: (307) 674-7655

Email: stpeterssheridan@gmail.com

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GENERAL INFORMATION

The subject of our own death is often an uncomfortable one, and we do not wish to bring it up to our loved ones, because we do not wish to cause them or ourselves pain. However, planning for our eventual passing is one of the kindest things we can do for our loved ones. They are already grieving, and they may not know what our wishes would be as they plan to lay us to rest.

This series of documents is intended to help you help your loved ones if you have not already done so. In addition to planning for your funeral, it can help you with creating a medical directive and writing a simple will.

If you do not have a will, the state did prepare one for you years ago, but you may not like the way the state has divided your possessions. If you want control, it is necessary for you to put your desires in writing, deciding how your possessions are distributed, who will be the trustees and executors of your estate, and of course, who will be guardians for your young children or dependents. This will bring peace of mind and relief to your loved ones, who will otherwise be burdened with those decisions in the event there is no will.

In the Episcopal Church, we believe that your estate and end-of-life plans should reflect your life's values. That is why we present the following sections for your consideration as you plan ahead.

- **“Planning Your Funeral.”** We suggest you design your funeral alongside your will. The funeral can then be a reflection of your life, a message to loved ones about your values and what was important to you.
- **“Writing Your Will.”** Once you have expressed your values through writing your funeral service, then write or amend your will so that it reflects those values.

Possessions – and how we use them – have a way of defining who we are. We hope this material will help you make important decisions to guide your loved ones and friends, so they will know who you were and what was important to you.

PRIVACY:

St. Peter's Episcopal Church is committed to full legal compliance with respect to protecting the privacy of the information that you entrust to us.

We collect nonpublic personal, financial, and statistical information about you from the following sources:

- Application or other forms you complete and give to us
- Transactions you make with us, or agents and sub-agents
- Consumer reporting agencies

We do not disclose any nonpublic, personal, or financial information about you to anyone, except as required by law. We restrict access to nonpublic, personal, financial information about you to those employees who need to know that information in order to provide services to you. We maintain physical, electronic, and procedural safeguards that comply with federal and state regulations to guard your nonpublic personal information.

PLANNING YOUR FUNERAL SERVICE

A WAY to EXPRESS YOUR VALUES

"I am the resurrection and the life, he that believeth in me, though he were dead, yet shall he live; and whosoever liveth and believeth in me shall not die."

---John 11:25

The Christian faith calls us to witness, even in death, the new life that God gives in Christ through his death and resurrection.

We have prepared this document to help you and your loved ones prepare in advance. It will enable your loved ones and the parish clergy to understand your wishes and preferences. The clergy will help plan the service and will stand ready to assist in any way.

Christian burial is marked by three characteristics. First and foremost, it is an act of worship wherein we glorify God for the gift of eternal life in Jesus Christ, our Lord. Second, it is a time when members of the Body of Christ gather to comfort one another and to offer mutual assurance of God's abiding love. Third, it is a liturgy of celebration whereby we give thanks for a deceased loved one and commend that person to the care of Almighty God.

The earliest records of Christian burial tell us that the following elements were included:

- Prayer in the home before the burial
- A gathering of the community for a burial service, consisting of thanksgivings, psalms, hymns, readings from Scripture, and prayers for the departed and those who mourn
- Celebration of the Holy Eucharist
- A procession of lights and torches to the place of burial
- The interment of the remains

As part of preparation for Christian burial, it is suggested that you talk with your clergy. It is also of great benefit to read about the service in *The Book of Common Prayer (BCP, 468-507)*. The rubrics on these pages are of particular interest. It is also recommended that people familiarize themselves with prayers for *"Ministration at the Time of Death" (BCP, 462-467)*.

FUNERAL SERVICE GENERAL INFORMATION AND NOTIFICATIONS

Final directions and instructions upon the death of

_____ *Full Name* _____ *Date*

File this information where it will be found easily upon your death. It is suggested that you file this with your local church or your attorney and notify your heirs that this form has been completed for their information.

_____ *Full Name* _____ *Spouse's Full Name*

_____ *Street Address, PO Box, and/or Apartment #* _____ *Street Address, PO Box, and/or Apartment #*

_____ *City* _____ *State* _____ *Zip Code* _____ *City* _____ *State* _____ *Zip Code*

_____ *Date of Birth* _____ *Date of Birth*

_____ *Place of Birth* _____ *Place of Birth*

_____ *Date of Baptism* _____ *Date of Baptism*

_____ *Father's Full Name*

_____ *Father's Place of Birth* _____ *Date* *Living*
Y N

_____ *Mothers Full Name (including Full Maiden Name)*

_____ *Mother's Place of Birth* _____ *Date* *Living*
Y N

Initials: _____ Date _____

Telephone

Email Address

SIGNATURE:

Signature

Printed/Typed Name

Be sure to retain a copy of your completed documents for your own records. If you have an executor of your estate, you may wish to provide a copy of these documents to that individual as well.

Initials: _____ Date _____

MY FUNERAL/MEMORIAL SERVICE

Please fill out this form and return it to the parish secretary in the church office. It is also suggested that you make a copy available in a place that will be easy for your loved ones to find.

Full Name of Deceased

Street Address, PO Box, and/or Apartment Number

City

State

Zip Code

The Episcopal tradition is that church members are normally buried from the church. The Book of Common Prayer (BCP) indicates the body is to be present, although a memorial service without the body may be held. If there is a coffin, it is closed and is always covered by a pall, which the church will provide. If there is an urn, there is a table on which to place the urn.

1. I request that my service be conducted at:

Name of Church and Location (Address, City and State)

Alternate place if above is not possible:

Site Name and Location (Address, City and State)

The rector or clergy of said congregation shall oversee the services.

2. The "Burial of the Dead" (the funeral service) is a series of psalm, lessons, and prayers. Holy Communion with special propers (i.e. Collect, Epistle, and Gospel) may be included.

I request (check one):

- The Burial of the Dead with Holy Communion (body or urn present)
 - Rite I (BCP, page 469) Rite II (BCP, page 491)
 - Rite I (BCP, page 323) Rite II (BCP, page 355)
 - Wyoming Eucharist (authored by L. Greenough/see priest for content)

- The Burial of the Dead (body or urn present)
 - Rite I (BCP, page 469) Rite II (BCP, page 491)

- A Memorial Service (body or urn not present)

Initials: _____ Date: _____

3. Other arrangements as follows *(contact parish administrator)*:

- Altar flowers:
 - Use Church's florist
 - Use a florist of my choosing:

*Name of Florist**Address, City/State/Zip of Florist**Phone Number*

I wish the altar flowers to include the following flowers:

- Ushers: (please provide information of ushers to be contacted)

Name	Address	City/State/Zip	Telephone #

- Pall bearers: (please provide information of pall bearers to be contacted)

Name	Address	City/State/Zip	Telephone #

4. I wish to have music at my funeral. If music is chosen, it should be confident and strong, expressing the hope and faith that Christians affirm in the presence of death. The congregation should participate fully in praying, singing the hymns, and joining the responses. Easter hymns are especially appropriate.

- I will have an electronic file of the music to be played at my funeral.
- I wish to have live music performed as follows:

Initials: _____ Date: _____

5. I request that the following Scriptures be read:

- Old Testament (*choose one*):
 - Isaiah 25:6-9 (He will swallow up death in victory)
 - Isaiah 61: 1-3 (To comfort all that mourn)
 - Lamentations 3:22-26, 3-33 (The Lord is good unto them that wait for him)
 - Wisdom 3:1-5, 9 (The souls of the righteous are in the hand of God)
 - Job 19:21-27a (I know that my Redeemer liveth)
 - Other: (Please list preferred scripture)
-

- Psalm (*choose one*):

<input type="checkbox"/> 23	<input type="checkbox"/> After Old Testament	<input type="checkbox"/> After New Testament
<input type="checkbox"/> 27	<input type="checkbox"/> 106	
<input type="checkbox"/> 42	<input type="checkbox"/> 116	
<input type="checkbox"/> 46	<input type="checkbox"/> 121	
<input type="checkbox"/> 90	<input type="checkbox"/> 130	
<input type="checkbox"/> Other: (Please list preferred scripture)	<input type="checkbox"/> 139	
-

- New Testament (*choose one*):
 - Romans 8:14-19, 34-35, 37-39 (The glory that shall be revealed)
 - 1 Corinthians 15:20-26, 35-38, 42-44, 53-58 (Raised in incorruption)
 - 2 Corinthians 4:16-5:9 (Things which are not seen are eternal)
 - 1 John 3:1-2 (We shall be like him)
 - Revelation 7:9-17 (God shall wipe away all tears)
 - Revelation 21:2-7) Behold, I make all things new)
 - Other: (Please list preferred scripture)
-

- Gospel (*must be included if Holy Communion is celebrated*):
 - John 5:24-27 (He that believeth hath everlasting life)
 - John 6:37-40 (All that the Father giveth me shall come to me)
 - John 10:11-16 (I am the good shepherd)
 - John 11:21-27 (I am the resurrection and the life)
 - John 14:1-16 (In my Father's house are many mansions)
 - Other: (Please list preferred scripture)
-

Speakers: (please provide information of speakers to be contacted)

Name	Address	City/State/Zip	Telephone #	Content (i.e. Old Test, Epistle, Psalm, Gospel, Eulogy, etc.)

6. I wish to have the following information included in the Funeral Bulletin/Program:

- Front page photo
- Inside front page photo
- Inside front page scripture or poem over photo
Scripture or poem to be used: _____
- Back page photo
- Back page scripture or poem over photo
Scripture or poem to be used: _____
- Back page obituary

- Music to be identified in the Bulletin/Program:

- Prelude music:
Name of Song: _____
 Taped Performed by _____
- Music during procession of coffin/ashes:
Name of Song: _____
 Taped Performed by _____
- Music before the Old Testament reading:
Name of Song: _____
 Taped Performed by _____
- Music before the New Testament reading:
Name of Song: _____
 Taped Performed by _____
- Music before/after the Gospel reading:
Name of Song: _____
 Taped Performed by _____

Initials: _____ Date: _____

- Music after the Eulogy:
Name of Song: _____
 Taped Performed by _____
- Music before the Eucharist:
Name of Song: _____
 Taped Performed by _____
- Communion hymns:
List song pages in Hymnal: _____
 Taped Performed by _____
- Recessional:
Name of Song: _____
 Taped Performed by _____
- Music during dismissal:
Name of Song: _____
 Taped Performed by _____
- Postlude music:
Name of Song: _____
 Taped Performed by _____

DISPOSITION OF MY REMAINS:

It is my wish that my remains be disposed of as follows:

Buried:

Location of cemetery plot deed, crypt deed:

Name

Address

City, State, Zip

Coffin specifications:

Least expensive

Mid-range

Elaborate

Cremated:

Before Funeral

After Funeral

Urn/box:

Least expensive

Mid-range

Elaborate

Final placement of ashes:

Location of columbarium contract:

Name

Address

City, State, Zip

Ashes to be spread or buried:

Location:

Donate entire body or certain organs (See Organ Donation Form):

Arrangements have been made

Please make appropriate arrangements

Initials: _____ Date: _____

PREPARING TO WRITE YOUR WILL OR REVOCABLE TRUST AN ESTATE PLAN THAT REFLECTS YOUR VALUES

Writing a will or trust is a loving and responsible act for the sake of your family. Here are a few helpful suggestions on how to prepare to write a will or trust.

BEFORE SEEING AN ATTORNEY . . .

- ❖ Make a list of everyone for whom you are responsible.
- ❖ List everyone that you would like to remember in your will or trust.
- ❖ List all your material assets, debts, liabilities and credit cards.
- ❖ After subtracting your debts, match the names with the assets or consider giving a portion of your total estate to each individual. Take care of your family first. This is also the time to consider special friends, organizations, and your church.
- ❖ Consider establishing a trust if your estate is large enough.
- ❖ Ask your chosen estate administrator (sometimes called executor/executrix) if he or she is willing to serve. Be sure to have at least two back-up individuals who can serve if your primary choice is not able to serve in this capacity.
- ❖ Consult with the people you select as guardians of your children/dependents (where minors and other dependents are involved).
- ❖ Talk with your priest to explore the ministries of the church that could best be funded with a gift from your will or trust.

BEQUESTS IN YOUR WILL OR TRUST CAN TAKE SEVERAL FORMS . . .

- ❖ An outright monetary bequest.
- ❖ A percentage of an estate.
- ❖ A specific asset, such as personal or real property.
- ❖ A testamentary trust created in a will or trust.
- ❖ A contingent beneficiary, i.e., the church receives the assets if there are no surviving beneficiaries.

Note: A bequest to the church is deductible from the value of your estate for tax purposes.

AFTER MAKING YOUR WILL OR TRUST . . .

- ❖ Make sure someone knows where your will or trust is located.
- ❖ Do not place funeral instructions in a safe deposit box. Generally, services will be over by the time your administrator checks your bank box. Instead, leave a copy of your funeral plans and wishes with your priest and a member of your family.
- ❖ Review your will or trust from time to time with your legal advisor. Laws, assets, and personal interests often change over time.

INCLUDING A CHRISTIAN PREAMBLE

A Christian preamble to our will or trust provides a significant opportunity to share your faith with family and friends. Through this personal statement of your faith, an important message will be delivered to those who love and know you best. This message of faith comes at a time of grief and loss and serves as a reminder to them to place their trust in Jesus Christ as you have done. Remember, this may be the last document they read about you, their loved one.

As you, together with your attorney, prepare your will/trust/estate plan, give prayerful consideration to adding a Christian preamble such as:

I, _____, of the City of _____, County of _____, and State of _____, being of sound mind and memory and being under no restraint, do make, declare and publish this my last will and testament, hereby revoking all wills and codicils heretofore made by me.

In thanksgiving to God for the gifts of life given in baptism, and for the many blessings God has showered upon me; and in thanksgiving to God for the gifts of faith and hope through Jesus Christ; and in thanksgiving to God for the gifts of nature and love through the Church where we have shared faith and fellowship; I now commend my loved ones to grow in this same faith, being true to their own baptisms, knowing that God will continue to provide for them in their lifetimes; I encourage them to place their faith and trust in our Lord and Savior.

[The particulars of the will or trust would follow, leaving gifts to family and friends, but also an articulation of the gifts you might leave to the various ministries of the Church].

SAMPLE FORMS OF BEQUEST

This document may begin with a general statement such as:

I, _____, hereby give, devise, and bequeath the following: [to be followed by specific gifts or bequests, such as are noted below]

Specific Amount:

_____ to the Name of Entity, Address, City, State Zip Code, or its successor entity in interest, to be used without any restriction for its general charitable and/or religious purpose and operations or for any specific purpose as its governing board or body may determine to be in the best interests of the organization.

Percentage Amount:

xx% of the rest, residue, and remainder of my estate, to the Name of Entity, Address, City, State Zip Code, or its successor entity in interest, to be used without any restriction for its general charitable and/or religious purpose and operations or for any specific purpose as its governing board or body may determine to be in the best interests of the organization.

Contingent Bequest:

In the event the beneficiaries of bequests and devises herein predecease me, or, in the case of institutions, cease to be organizations described in section 501 (c)(3) of the Internal Revenue Code, the rest, residue and remainder of my estate, to the Name of Entity, Address, City, State Zip Code, or its successor entity in interest, to be used without any restriction for its general charitable and/or religious purpose and operations or for any specific purpose as its governing board or body may determine to be in the best interests of the organization.

INFORMATION NEEDED FOR ESTABLISHING AN ESTATE PLAN

MY INFORMATION:

1. Full Legal Name:

Name	Date of Birth	Social Security Number
Street Address, PO Box, and/or Apartment #		County
City	State	Zip Code
Email Address		
Armed Forces Dates of Service	Discharge Certificate Location	
Military Serial Number		

Marital Status: Single Married Partner/Civil Union
 Divorced Remarried Separated Widowed

2. Do you have a durable power of attorney? Yes No (If no, go to Family Information)
 Do you have an advanced health care directive (HCPOA or living will)? Yes No (If no, go to Family Information)
 Do you have a will? Yes No (If no, go to Family Information)
 Do you have a revocable trust? Yes No (If no, go to Family Information)

3. Since making your current legal documents, have you:

	Yes	No
Moved to another state?		
Sold or bought property?		
Celebrated the birth of a child or grandchild?		
Changed marital status?		
Changed your mind about your personal representative (executor)?		
Changed your mind about the guardian for your children/dependents?		
Done family financial and charitable gift planning?		
Made other decisions that have an effect on the disposition of the above documents?		

If the answer is yes to any of the above, your documents may need to be updated. Complete the following questions, then consult with your attorney.

Initials: _____ Date: _____

FAMILY INFORMATION:

1. Legal Name of Spouse:

Name	Date of Birth	Social Security Number
Street Address, PO Box, and/or Apartment #		County
City	State	Zip Code
Email Address		

Does your spouse have a will? Yes No

2. Children/Grandchildren (List your children & grandchildren, including those legally adopted, step-children/step-grandchildren):

Full Name	Street Address, PO Box, and/or Apartment #	City/State/Zip Code	Date of Birth

3. Other Dependents (If caring for parents/grandparents):

Full Name	Street Address, PO Box, and/or Apartment #	City/State/Zip Code	Date of Birth

Initials: _____ Date: _____

4. Other Loved Ones:

Full Name	Street Address, PO Box, and/or Apartment #	City/State/Zip Code	Date of Birth

5. Person(s) to be the Guardian(s) of My Child(ren)/Dependents:

Name Telephone

Street Address, PO Box, and/or Apartment #

City State Zip Code Email Address

Name Telephone

Street Address, PO Box, and/or Apartment #

City State Zip Code Email Address

6. Executor (Person(s) to be the personal representative of my estate):

Name Telephone

Street Address, PO Box, and/or Apartment #

City State Zip Code Email Address

Initials: _____ Date: _____

Executor (continued): (Person(s) to be the personal representative of my estate in the event the primary choice is not able to serve in this capacity):

Choice #2:

Name	Telephone		
Street Address, PO Box, and/or Apartment #			
City	State	Zip Code	Email Address

Choice #3:

Name	Telephone
Street Address, PO Box, and/or Apartment #	

Choice #4:

Name	Telephone
Street Address, PO Box, and/or Apartment #	

7. Location of My Records:

Item	Location
Passwords/Pins/Phone Code	
Will	
Advanced Health Care Directive and Durable Healthcare Power of Attorney	

Revocable Trust	
Birth Certificate	
Social Security Card	
Tax Records	
Safe Deposit Box/Key	
Insurance Policies	
Durable Power of Attorney	
Funeral Instructions	
Full Information of Parents (full names and places of birth, including the full maiden name of mother)	
Other Documents (List below):	
Cremation/burial signed documents and instructions	

8. Beneficiary Information (persons, Parish/Mission, or charitable associations you wish to thank for being part of your life):

_____	_____
Name	Bequest
_____	_____
Name	Bequest
_____	_____
Name	Bequest
_____	_____
Name	Bequest
_____	_____

Name

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Bequest

Name

Bequest

Residual Beneficiary (The final or residual beneficiary receives what is left over after all other bequests have been paid according to your will. Please consider naming your Parish/Mission as a residual beneficiary.)

Initials: _____ Date: _____

Financial Information:

1. Present Annual Income:

Salary	\$ _____
Investment Income	\$ _____
Retirement Income	\$ _____
Other Income:	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL	\$ _____

2. Property (Real Estate):

Description/Location	Original Cost	Present Mkt Value	Mortgage Amount

3. Mineral Interests on Property noted above:

Description/Location	Percentage of Mineral Interest

4. Notes and Mortgages:

Name of Debtor	Description	Mortgage Amt	Interest Rate	Payment Amt

5. Leases

Lessor:	Lease Period	Total Lease Amount	Lease Payment Amt

Lessee:	Lease Period:	Total Lease Amount	Lease Income Amt

6. Bank Accounts/Retirement Accounts (IRA, etc.)/Other Income-Producing Accounts:

Name of Institution	Type of Investment	Account Number

7. Stocks/Bonds:

Corporation	# of Shares	Original Cost	Market Value

8. Insurance Policies:

Company	Policy #	Face Value	Cash Value

9. Other Assets:

Description	Location	Original Cost	Present Value

10. Credit Cards:

Description	Number		Present Balance

11. Notes:

PLANNING FOR THE FUTURE

1. Monthly Expenses:

Mortgage/rents	\$ _____
Insurance	\$ _____
Utilities	\$ _____
Taxes	\$ _____
Credit Cards	\$ _____
House expenses/repairs	\$ _____
Auto expenses/repairs	\$ _____
Clothing/personal care	\$ _____
Education	\$ _____
Pledges/charitable gifts	\$ _____
Birthdays/holidays/allowances	\$ _____
Medical/dental	\$ _____
Vacation/recreation	\$ _____
Other: _____	\$ _____
_____	\$ _____
_____	\$ _____
TOTAL	\$ _____

2. Projected Retirement Income:

Description	Estimated Amount	Continues to Spouse		
		Yes	No	Half
Social Security				
Pension Plans				
Retirement Accounts (IRA, 401K, etc.)				
Charitable Trusts				
Stock Dividends				
Gift Annuities				
Pooled Income Fund				
Mortgages				
Royalties				
Mineral Interests				
Life Insurance				
Other (describe below)				
TOTAL				

WYOMING

ADVANCE DIRECTIVE

Planning for Important Healthcare Decisions

The Wyoming Advance Directive to plan for important healthcare decisions document is provided courtesy of **CaringInfo** (www.caringinfo.org) and is recommended by Christopher Sherwood, Attorney at Law, Yankee and Toner. This document is a fillable form and is provided for your convenience through the following link:

<https://www.caringinfo.org/wp-content/uploads/Wyoming.pdf>

The **CaringInfo** Site (www.caringinfo.org) is also replete with good information for both those planning for the future as well as those already immersed in serious illness and caregiving situations.

NOTE: When having your documents witnessed and notarized, it is important to have the documents witnessed and notarized by individuals who have no involvement with your estate.