

MESSAGE TO SURVIVORS

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Consider creating a message for your survivors. Here are some considerations:

- Think about what **you** would want to know if you had this responsibility
- To whom is it addressed? (include everyone who should know)
- Distribute in advance, allow for questions and discussion and revisions
- Begin by saying why you're doing this, purposes

What to include:

If you are unable to care for yourself

- Who will make decisions?
- Where will you live? Nursing homes? Live-in care? Other?
- Describe preferred criteria for this part of life.
- Do you have a Long Term care policy insurance policy?

The Dying Process

- Who will be in charge, decision maker, with backup(s)?
- How you want to die, where and with whom. Hospice care? Spiritual guidance?
- How and to what extent you wish to avoid being a burden for spouse, children, others.
- *Durable Power of Attorney for Health Care*, hospice services. Be sure up to date, spell out here.

After your death

- Burial, cremation or?
- Wishes for funeral?
- Memorial service?
- Newspaper obituary
- Death Certificates

Estate Issues

- Where to find and summary descriptions of *Revocable Living Trust* and *Pourover Will*.
- Rough estimate of how much will be left, and to whom (if you want to do this now), with caveat that it may end up being much less.
- Same for Retirement Plans, how much and to whom.
- Names and addresses of attorney, financial managers, accountant, etc. Location of relevant documents on this, what and where (safe deposit? desk, file cabinets, drawers, etc.)
- Insurance policies, what and where to find
- Personal belongings and how to dispose of them, especially. those of significant value. Preclude possible disputes.

Office Contents

- Where to find everything significant – checkbooks, credit card info, tax returns, other important papers.
- Describe papers, records, etc. with instructions on what to do with them, what to keep, discard, distribute, etc.
- What is confidential and should be destroyed.
- Valuable office equipment (e.g. computer) and how to dispose.

Personal Property

- Brief summary of valuable belongings, books, art, furnishings, etc. and how you would like them distributed or disposed of. Identify particularly valuable items and perhaps specify how to distribute.
- Indicate preferred method of decision making re who gets what.
- Also personal correspondence, diaries, records, etc. What to save and what to discard.
- Will/revocable trust. Make sure all who should know about this, have copies or essential summaries, and/or know where to find. Tell them you're available for questions and discussion
- Disposition of valuable (intrinsically or emotionally) possessions. Indicate who should have special items and/or suggest ways of dividing. Suggest others to Goodwill, Salvation Army or?

Ending

- Finish with invitation to all for suggestions for changes and additions.
- And, of course, expressions of affection and appreciation for those this is addressed to.