

The Blue Book

An end of life workbook for you
and your loved ones.

Alabama **ONE**[®]

One.Together.

Starting the Conversation

Planning for you or a loved one's final days is not easy, but it is a priceless gift to leave behind.

Studies show that when there is meaningful conversation about end-of-life choices, surviving family members and friends report feeling less guilt and less depression and have an easier process of grieving. Thinking through these issues before a medical crisis will help you and your loved one make decisions based on what is valued most, without the influence of stress and fear.

As you prepare for a conversation with your loved ones, ask yourself:

- What do I need to think about or do to feel ready to have this conversation?
- What concerns do I want to be sure to bring up?
- Who could I have a practice conversation with?
- Who should be a part of the discussion?
- When would be a good time to talk?
- Where would you and your loved ones feel comfortable talking?
- What do you want to be sure to say?
- How do my loved ones feel about "death talk?"
- What can I do to make it a productive discussion?

Ways to start the conversation

- I need your help with something.
- I want to prepare for the future. Will you help me?
- I was thinking about what happened to ____, and it made me realize ____.
- Even though we are ok right now, I'm thinking about ___ and I would like to be prepared.
- I went to an Alabama ONE event, and my homework is to ____.

Remember

- You do not have to cover everyone and everything at once. Be patient and give others time to think about what is said.
- Nothing is set in stone. You and your loved ones can revisit issues as circumstances change.

Keep Going

Hopefully, the initial conversation will be the first of many. Think about how it went, and how you would like future talks to go. For example:

- What do you want to remember about it and what do you want your loved ones to remember?
- Is there anything you need to clarify?
- What do you want to be sure to talk about, or ask about, next time?
- Another important follow-up conversation is putting what you talked about in writing.

Coming to a difficult conversation from a place of openness and curiosity—with a genuine interest in coming to a shared understanding with your loved one— will help the conversation be as smooth as possible.

Your Professionals

| | Name, Company | Address | Email | Phone Number |
|--------------------------------------|-------------------------------------|---|--|----------------|
| Example | Jonathan Livingston, Alabama ONE | 4520 21st Street, Tuscaloosa, AL 35401 | JonathanLivingston @ alabamaone.org | (205) 555-5555 |
| Accountant | | | | |
| Attorney | | | | |
| Banker | | | | |
| Insurance Agent | | | | |
| Financial Advisor | | | | |
| Retirement Plan Administrator | | | | |
| Pension Provider | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

Important Paperwork

| Important Files | Location | Notes |
|---|----------|-------|
| Estate planning files (like wills, trusts, POA) | | |
| Birth Certificate | | |
| Marriage Certificate | | |
| Deed(s) | | |
| Vehicle Title(s) | | |
| Social Security Card | | |
| Passport | | |
| Stock Certificates | | |
| | | |
| | | |
| | | |
| | | |

Funeral Preferences

Officiant

Eulogy

Burial

Cremation

Body Donation

Headstone/Ashes

Type of Service

Charity in lieu of flowers

Yes

No

Charity

Pallbearers

Logins and Passwords

Password Manager Provider _____
Login _____
Password _____

Email Account Login _____
Password _____

Computer/Laptop Passcode _____
Tablet Passcode _____
Phone Passcode _____

Facebook Login _____
Password _____

Instagram Login _____
Password _____

Other Social Media Login _____
Password _____

Cloud Storage Provider _____
Login _____
Password _____

Provider _____
Login _____
Password _____

Provider _____
Login _____
Password _____

Logins and Passwords (continued)

| | | |
|-------|----------|-------|
| _____ | Provider | _____ |
| | Login | _____ |
| | Password | _____ |
| _____ | Provider | _____ |
| | Login | _____ |
| | Password | _____ |
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| _____ | Provider | _____ |
| | Login | _____ |
| | Password | _____ |
| _____ | Provider | _____ |
| | Login | _____ |
| | Password | _____ |

Accounts

List any assets, debts, or monthly bills.

EXAMPLES:

House at 312 Main Street

005005

No mortgage, title in the firebox

1992 Jeep Wrangler

123456

Parked at Cook's for classic car
month ever July

Planning for Loved Ones with Disabilities

We encourage you to research and develop a “Letter of Intent” for loved ones with disabilities. This letter should memorialize your knowledge of their needs so that it can guide future caregivers. This letter should address:

General Overview

- Social security number and license/ID number.
- Current and previous addresses.
- Diagnosis – date, diagnosing physician, symptoms that led to diagnosis, and your future goals for their quality of life.
- What you want people to know about them.
- Clothing sizes.

Personality

- How can you tell they are happy?
- What are verbal and physical signs they are unhappy?
- What triggers anxieties or fears?
- What soothing techniques help?
- Do they have particular sensitivities?
- Are they touch-seeking or touch avoiding?
- How do they communicate, including nonverbal clues if applicable?
- Describe their mobility, aides used, and assistance required.

Recreation

- Favorite vacation spots, traditions, activities, and travel companions.
- Elements of past vacations that were successful or unsuccessful.
- Travel or transportation limitations.
- Exercise routines, including how much support is required for various activities.
- Special traditions that should continue to be a part of their life.

Daily Routines

- Structured and unstructured activities your loved one does, including schedule, frequency, location, and any companions involved.
- Liked and disliked activities.
- Eat, sleep, bath, and other routines.

Behavior Management

- Behavior management programs that have had a positive impact.
- Behavior management programs that have been unsuccessful.
- People that can connect emotionally with this loved one.
- Contact information of people that can help.

Advocates

- Can your loved one advocate for themselves when asking for help, applying for benefits, getting services, etc?
- Contact information of family members and friends that act as advocates.
- Contact information of professionals that act as advocates.
- Contact information of their representative payee, if applicable.

Nutrition

- Food preferences for each meal, including favorite foods, amounts, timing, spice level, etc.
- Special occasion meals.
- Favorite meals.
- Recipe locations.
- Does your loved one prepare their own meals? Does anyone in particular prepare the meals mentioned above?
- Food allergies or sensitivities.
- Liked and disliked restaurants.
- Assistance needed with eating or cooking.

Medical

- List and contact information of all medical professionals, including previous medical professionals.
- Fears, angers, or anxieties around medical professionals.
- Pharmacy location.
- Prescriptions taken, including name, dosage, time of day taken, frequency, and how it is administered.
- Over the counter medications used.
- Drug allergies or sensitivities.
- Non-food related allergies or sensitivities, like fabrics or latex.
- Visual aids, like contacts or glasses, and how often they are used.
- Auditory aids, like hearing aids, and how often they are used.
- Adaptive aids, like wheelchair, and what is needed to maintain them.
- Vaccination records.
- Residential or long-term care received.
- Previous surgeries and procedures.
- Health insurance policies, including type, carrier, policy holder, policy number, and contact information.
- How insurance coverage would change upon the death of any caregivers or guardians.

Financial

- Financial assets that would affect or benefit your loved one, including 401(k), bank accounts, life insurance policies, etc.
- Instructions for claiming accounts that name this loved one as a beneficiary.
- Financial assets belonging to this loved one, and how to access them if needed.
- Support needed in managing money, if any.
- Accounts earmarked for a specific purpose, if any.

Government Benefits

- List of all government benefits received and recertification dates.
- Benefits that may be applied for in the future.
- Accounts that should be liquidated first to receive or maintain government benefits.

Education

- List schools or special classes attended. How does your loved one get there?
- Copy of Individual Education Plan (IEP).
- Academic programs, subjects, and skills that are important to you or the loved one.
- Medication schedules while at school.
- Additional needs while at school.
- Contact information of favorite teachers or coaches who understand your loved one.
- Actual and desired level of classroom integration.
- Desires and plans for continuing education or transitioning in the workplace.

Employment

- Different types of work they may enjoy.
- Supports needed to reach their potential.
- Contact information for supervisors or managers.
- Employment income before taxes.
- If not employed, what is their main source of income?

Environment

- Do you prefer that your loved one continues to live in their current community? Why or why not.
- Supports needed to live in their preferred community.
- Environmental conditions that should be avoided.
- Accessibility measures in place at their home.
- Accessibility measures that may be necessary in the future.
- Comfort items the loved one needs in the home and how those items are used.

Social Activities

- Social activities the loved one enjoys.
- Group activities they are involved in, including frequency, location, and level of support needed.
- Special instructions for giving and receiving gifts, including what is appropriate for your loved one to give or receive.
- Activities to be avoided or minimized and why.
- Tips for successful socializing.

Religious

- Previous religious affiliations.
- Contact information for their place of worship.

Legal and Estate Planning

- Estate planning instruments you have in place.
- Location of your estate planning documents.
- Estate planning instruments your loved one has in place.
- Guardianship or conservatorship information, including names, contact information, and date established.
- Contact information for legal professionals.

Online Accounts

- List online accounts and login information that you oversee for your loved one.
- Instructions a new caregiver would need to know.

Checklist: Following the Death of a Loved One

Grief can be a long, hard journey. If you are in need of resources, please visit Wings Across Alabama or call their hotline at 844-999-4647. Please keep in mind, as Earl Grollman said: *“grief is not a disorder, a disease or a sign of weakness. It is an emotional, physical and spiritual necessity, the price you pay for love. The only cure for grief is to grieve.”*

Immediate Tasks

- Get a legal death certificate
- Arrange care for pets or dependents
- Secure major property, like home or vehicles
- Notify close friends and family
- Notify their employer, if any
- Notify their estate planning attorney, as their documents may indicate end of life wishes

Within a Few Days

- Decide on funeral plans
- Start going through the mail
- Ask the post to forward mail
- Register for the Deceased Do Not Contact (DDNC) List
- Perform a more thorough home check – toss food, water plants, etc.
- Write an obituary

Leading up to Funeral Plans

- Determine whether you will need financial assistance
- Look into veterans' benefits, if applicable, at benefits.VA.gov
- Choose funeral participants
- Set the funeral schedule
- Order printed materials and flowers
- Coordinate food and drinks, if desired
- Spread the word

Within a Few Weeks

- Order a headstone
- Order copies of the death certificate for various needs, usually 5-10
- Contact the social security office for survivor benefits
- Notify bank or mortgage companies
- Reach out to accounts, financial advisors, or brokers
- Notify life insurance companies
- Cancel other insurance policies
- Identify and pay important bills
- Close credit card accounts
- Notify credit reporting agencies to prevent fraud
- Cancel the deceased driver's license
- Memorialize Facebook account
- Close email accounts

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