

# The Blue Book

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

Alabama **ONE**<sup>®</sup>

*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.







# Important Paperwork

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



# Funeral Preferences

**Officiant**

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**Eulogy**

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Burial

Cremation

Body Donation

**Headstone/Ashes**

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**Type of Service**

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**Charity in lieu of flowers**

Yes

No

**Charity**

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**Pallbearers**

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# 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 \_\_\_\_\_





# 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](https://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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[alabamaone.org](http://alabamaone.org)