



SOUTH CAROLINA FAMILY AND COMMUNITY LEADERS
Affiliated with National Volunteer Outreach Network, Country Women's Council, U.S.A., Associated
Country Women of the World and in partnership with Clemson University Cooperative Extension Service
SCFCL website: <http://www.scfcl.com>

Leader Training Guide

“Basic Information Before Leaving Earth” – Documents for Your Personal Life

Objectives:

To provide information that will help in preparing and organizing your records so that family members will be able locate your documents that clearly state your personal wishes in the event of serious illness or death.

Lesson Overview/Introduction:

This lesson will help you become familiar and understand the purpose of critical documents that everyone should have prepared and signed that reflect your personal wishes in the event you are not able to communicate them for yourself.

Lesson:

There are several documents that you should have ready for the time when they are needed. Some people choose to have a lawyer prepare these documents and other people prepare their own and have the signature witnessed and/or notarized. Everyone has different needs and every situation is different; therefore, it is also recommended that you talk to a medical or legal professional for advice.

One – a Will – Last Will and Testament – within this document a personal representative is identified.

Two – a Living Will

Three – Power of Attorney (This person represents your business interest and speaks for you. For example, if you are seriously ill, they can pay your bills. A clear understanding of this document is needed before signing.)

Four - a Health Care Power of Attorney

Five – a valuable documents list and where they are stored so family members or the person you appoint to act for you can find them if you are not able to communicate.

Explain these simple documents.

Health Care Power of Attorney: This document appoints an Agent to act for you to let medical personnel know what you **DO** or **DO NOT** want done for you in the event of serious illness or when you cannot make your wishes known yourself.

Living Will: This document lets medical personnel know what you **DO NOT** want done for you, such as a certain treatment or life support.

Valuable Documents List: This is a list of life record documents such as birth certificate, marriage license, savings accounts, retirement funds, life insurance, stocks, bonds, etc., that will be needed in the event of your serious illness or death. It may include your funeral plans, too.

Lesson Summary:

When individuals cannot make their own decisions, someone will make decisions for them. The documents discussed in this lesson will allow you to have a voice even when you are unable to speak. Making your wishes known will bring comfort to you and to those who will be responsible for seeing that your wishes are carried out. By compiling this information now, you will help make the experience a little easier for those who will be called upon to make the decisions for you at a time when you cannot act for yourself.

Suggested Activities: Use the Five Wishes booklet as a resource for this discussion.

Talk about which papers you think should be included on your “valuable documents” list.

Go over the sample Living Will and discuss the decisions that will arise in the event of your serious illness.

Go over the sample Health Care Power of Attorney and talk about who would be the person you should name as your Agent if you are seriously ill and cannot act for yourself.

Discuss why they are needed.

Look at the Living Will form. Discuss medical procedures that you **do not** want.

Look at the Health Care Power of Attorney form. This form appoints an Agent who knows what your desires are and who has authority to tell medical personnel what you **do** or **do not** want done if you cannot make your own wishes known.

Discuss what you would want done if you could not make your own decisions.

Would you want to be placed on life support?

Would you want a feeding tube?

Who would you choose to make these decisions for you?

Be sure to talk with the person that you appoint and give them information in writing so they can carry out your wishes.

Tell participants where they can obtain a copy of the “Five Wishes” brochure.

Discuss the list of valuable documents and talk about which ones you would need in your personal valuable document files.

Suggested Materials:

“Five Wishes” brochure – (sample attached) – contains a Living Will form and a Health Care Power of Attorney form and can be obtained at www.agingwithdignity.org – or call 1-888-594-7437. Cost is \$5 for an individual personalized copy.

The “Five Wishes” document became legal in South Carolina and was signed into law by Governor Sanford in June, 2005.

Valuable Papers Inventory. (Sample Attached) – is part of the “File It, Find It” lesson HM 665 developed in 1995 by Joyce Christenbury, C.H.E., Family Resource Management Specialist.

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Sources/References: SC Lieutenant Governor’s Office on Aging,
Upper Savannah Council of Governments Office on Aging
Aging with Dignity Organization

VALUABLE PAPERS INVENTORY

Do not store these in a Safe Deposit box. Put them somewhere safe that can be accessed immediately in case of need.

Family Name _____ Date Last Revised _____

List names of all family members, including children and spouses.

Name _____ Husband/wife _____ Date of Birth _____ Where Birth Recorded _____

People to notify in case of emergency:

Name _____ Address _____ Telephone Number(s) _____

If you have given someone the legal power to act for you in case conditions make you unable to handle your own affairs, indicate below:

Name _____ Address _____ Telephone number(s) _____

Family Advisors: Name, address and telephone numbers.

Minister _____

Doctor _____

Dentist _____

Accountant _____

Insurance Agent(s) _____

Personal Representative named in Will _____

Other _____

Personal Papers: Name, Card Number

Social Security _____

Driver's License _____

Insurance Policy _____

Name of Company	Local Agent
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Policy Number	Policy Amount
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Name of Insured	Beneficiary
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Policy Location	
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Banking Services:

Name, Address, Phone No.	Account Number	Name(s) on Account
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Checking Accounts:

Savings Accounts:

Trust Accounts:

Bank Credit Cards:

Real Estate (including Cemetery Plots: Address and Location of Records

Investments – Stocks, Bonds, Mutual Funds, Annuities, Retirement Funds

List any of the following documents and where they are located:

Birth Certificates, Baptism Records, Adoption Papers, Divorce Papers, Funeral Directions, Health Records, Marriage Certificates, Income Tax Records, Military Records, Pension Records, Safe Deposit Box Inventory, Location of Will and other Instructions.