

P4I Catalog

Help with Preparing for the Inevitable

Version 1.4

November 20, 2021

1 Primary Document, Video and Slides

1.1 “Rationale” Document

This document explains why and generally how people should prepare their estates and health care choices in case of death or serious incapacity.

[Rationale Document \(PDF\)](#)

1.2 Video Description on YouTube

This video describes the rationale, toolkit and resources.

[Video on YouTube](#)

1.3 PDF of Slides

This is a PDF of the slides we developed for our talk that’s available on TLC YouTube channel.

[PDF of P4I Slides](#)

2 Workbooks

2.1 P4I Microsoft Excel Workbook

If you have Microsoft Excel and know how to use it, this format is an easy way to organize all the information you need.

[Excel Workbook](#)

2.2 P4I Microsoft Word Workbook

If you have Microsoft Word (or other compatible software) and know how to use it, this format is an easy way to organize all the information you need.

[Microsoft Word Workbook](#)

2.3 P4I Printable Workbook

If you just want to print out a form to fill out by hand, use this link.

[Printable Workbook](#)

3 Useful Links

Bonnie's Research and Links for the Website Catalogue on End-of-Life Planning:

3.1 Estate Planning Resources

3.1.1 Five Tasks to do Now

Health care wishes

Choose an executor

Protect financial interests

Finalize your will

Create a "need to know" file

<https://finance.yahoo.com/news/estate-planning-checklist-5-tasks-093500303.html>

3.1.2 Checklist for contents of Life File

<https://deathwithdignity.org/life-file/>

Questions to ask your estate-planning attorney and questions to ask yourself afterwards

<https://www.investopedia.com/articles/personal-finance/070815/10-questions-ask-your-estate-planning-attorney.asp>

3.1.3 Questions about Living Trusts

<https://portlegal.com/top-10-questions-to-ask-while-creating-a-living-trust/>

3.1.4 Powers of Attorney for finances and healthcare

[Legal shield blog](#)

3.1.5 What to Include in a Will

Assets to include in a will and what doesn't go there (includes guardianship of children and pets.

<https://www.joincake.com/blog/asset-list-for-will/>

3.1.6 The Revocable Trust in Florida (do you need one?)

<https://www.floridabar.org/public/consumer/pamphlet028/>

3.1.7 Financial Power of Attorney (for Florida)

<https://www.floridabar.org/public/consumer/pamphlet13/#1616442182855-9fd517f9-0ab5>

3.1.8 Duties of an Executor

Stage 1: protect property and find the will and/or trust.

Stage 2: contact the lawyer holding your papers or submit the will to the court.

<https://www.kiplinger.com/article/retirement/t021-c032-s014-how-to-perform-the-duties-of-executor-of-an-estate.html>

Social Security report of death (usually done by funeral home), death benefits and survivors' benefits.

<https://www.ssa.gov/benefits/survivors/#anchorinfo>

3.1.9 U.S. Railroad Retirement benefit information

<https://rrb.gov/>

3.2 Health Care Planning and Living Wills

The Five Wishes (meets the legal requirements for a living will in 44 states including Florida).

https://en.wikipedia.org/wiki/Five_Wishes

Mayo clinic information about what to discuss with your doctor to plan for your end-of-life care specific to your needs in terms of things like artificial life support, breathing tubes, feeding tubes, etc. and how much you want or do not want these things.

<https://www.mayoclinic.org/healthy-lifestyle/consumer-health/in-depth/living-wills/art-20046303>

Information and resources to help make decisions about serious illness and end-of-life care and services.

[The National Hospice and Palliative Care Organization](#)

How to write a living will

<https://www.nolo.com/legal-encyclopedia/how-write-living-will.html>

Florida Living Wills:

<https://www.nolo.com/legal-encyclopedia/how-write-living-will.html>

Florida's Physician orders for life-sustaining treatment (POLST) form

<https://www.nolo.com/legal-encyclopedia/floridas-physician-orders-life-sustaining-treatment-polst-form.html>

<https://polstfl.org/contact-florida-polst/>

Cornerstone Hospice information and resources: <https://cornerstonehospice.org/>

Your Key to Senior Living Options has a free toolkit that includes planning for end-of-life medical care: <https://yourkeytoseniorlivingoptions.com/senior-care-planning/>

Organ donation should also be considered ahead of time:

<https://www.donatelifeflorida.org/>

3.3 Burial and Cremation Planning and Services

Funeral home preplanning checklist (includes burial and cremation)

<https://www.villagefh.com/preplan/preplanning-checklist>

Checklist for when a Loved One Passes Away and cremation is desired. Booklets available free on the following topics:

- Everything you need to know about preplanning your final arrangements
- The Conversation Checklist
- Cremation answer booklet
- The Complete Checklist for when a loved one passes away
- Veteran Death Benefits and Memorialization for Service members and their families.

https://www.neptunesociety.com/next-steps-when-a-loved-one-passes?gclid=EAlaIqobChMI7_3Hx5vN8wIVQqGGCh3QTQ1BEAAYAiAAEgKrvD_BwE

National Cremation Society

https://info.nationalcremation.com/cremation-information/?gclid=EAlaIqobChMIhLOh2urj8wIVFobICh24hgHGEEAYASAAEgLF-PD_BwE

Planning for funerals, memorial services. Helpful info for 5 types of major religions (Catholic, Jewish, Buddhist, Islamic and Hindu) and for non-religious (humanist and atheist) funerals, customized by the person or the family. Includes IMMEDIATE steps to take when someone dies (calling the hospice if under care & they will handle the rest or if not, call 911, etc.)

<https://www.memorialplanning.com/resources/religious-funerals-guide>

The Villages Community Development district information about room reservations at recreation centers

<https://www.districtgov.org/departments/Recreation/rentals.aspx>

3.4 For Veterans and Their Families

Military directory to request funeral honors including presentation of a flag

<https://www.militaryonesource.mil/leaders-service-providers/casualty-assistance/military-funeral-honors/>

Office of Survivors Assistance information

https://www.va.gov/survivors/contact_us.asp

Requesting Veterans' military records

<https://www.archives.gov/veterans>

VA burial and memorial information is available on the VA website:

<https://choose.va.gov/burials-memorials>

Additional details about burial and survivor benefits.

<https://www.usa.gov/veteran-burial-benefits>

10 Facts about VA Burial Benefits:

<https://www.agingcare.com/articles/facts-about-va-burial-benefits-157593.htm>

VA National Cemetery information

<https://www.cem.va.gov/>

Florida Veterans Affairs Cemeteries (9 cemeteries)

<https://www.cem.va.gov/cems/state.asp?State=FL>