

# Notes to My Family

*Organizing our later years.*

## *Introduction*

*Hospice Giving Foundation :: 80 Garden Court, Suite 201 :: Monterey CA 93940 :: [hospicegiving.org](http://hospicegiving.org)*



## Welcome to *Notes to My Family*

*Notes to My Family* was created to help individuals leave to their family members the comforting gift of information in advance. At Hospice Giving Foundation, we have learned that the end-of-life process is often consumed by gathering of these details and information, rather than cherishing precious moments and celebrating the life of a loved one with that person.

*Notes to My Family* is a planning tool which gives people a convenient place to express their wishes for end-of-life care and catalog important information. Hospice Giving Foundation is pleased to present *Notes to My Family* online, providing a digital way to gather the story and details of your life all in one place. *Notes to My Family* is organized into four easy to manage modules. Throughout *Notes to My Family*, we will remind you how to protect your privacy and sensitive personal information.

Think about the people with whom you want to share this activity. We know that once you start using and updating *Notes to My Family* with your family or close friends, stories will unfold and memories will be shared. Ultimately, the information and memories will create an enduring gift to your family and loved ones.

**Module One, *About You and Your Family***, provides you with an opportunity to share important details about you and your life history. It requests you provide specific information that will benefit your family members, especially if you are unable to speak up for yourself. *About You and Your Family* lets you share the names of those who are important to you, the ways to contact them, and even how to handle your household affairs.

**Module Two, *Assets, Legal, and Financial***, helps you prepare for legal considerations, which can become very complex without advance planning. You'll be asked to catalog a lot of important information that will help protect your assets and give others access to essential details when needed. *Notes to My Family* does not provide and is not a substitution for legal advice. However, this tool provides you with a useful road map that can make the time spent with your advisors more efficient.

In **Module Three, *Health Information***, you will be asked to document your important health information and your history including past illnesses, surgeries, medications, and allergies. There are forms referenced in this section: the POLST (Physician Orders for Life-Sustaining Treatment), a Durable Power of Attorney for Healthcare, and the Five Wishes. These are key documents that need to be completed with your physician and family members. Information provided in this section of *Notes to My Family* will help guide you, and/or the person you dedicate, to make health-care decisions for you.

In **Module Four, *Wishes and Memories***, you will be asked to answer sensitive questions such as burial plans, whom to notify upon your passing, and your intentions about organ donations. Wishes and Memories may help you find peace and solace by leaving messages for family members or loved ones and expressing your final wishes. It is a special section that will allow others to fully honor your life.

At the end of this introduction, you will find a glossary with definitions of terms that are referenced throughout *Notes to My Family*. We hope this will be a benefit to you and your family throughout your planning process and will assist in a clear and shared understanding of your wishes by your family members.

## Introduction

### Ways to Use This Organizer

This document is meant to guide you in gathering important information to give you and your loved ones peace of mind. We've created what we consider a very detailed tool. That does not mean you have to fill out every single section. We know each person will complete it in the way that best suits their needs.

We encourage you to take time and be patient while completing this project. More than likely you will want to do this a bit at a time, otherwise it might feel overwhelming. We suggest you begin by reviewing each section, to get a feel for what kind of information you'll want to organize. Gathering all of this information and the related documents is a little like packing up your favorite room of your house. You'll find treasures you've forgotten about, it may be tough to put your hands on some of the information, and some sections won't seem quite so important to you. You might even get distracted sharing stories along the way! It's a personal journey. But at the end, you'll feel the sense of satisfaction and peace of mind that comes from having so many details pulled together.



Each section has a corresponding video with helpful guidance and tips from people who believe this process is important. They share expertise and offer encouragement to help you along. Throughout this toolkit you'll also find 'Helpful Tips' — suggestions to help you with decision-making and organizing. We've compiled many of these tips based on others' experiences and we hope you will share your ideas or suggestions with us in the future as well.

### Moving Around in These PDFs

If you are completing this document on your computer, the easiest way to move from page to page is by using your mouse to click on the arrows at the bottom of the page. (You can also use the 'Tab key' on your keyboard to tab from field to field and from page to page.) The left-pointing arrow will move you back to the previous page, while the right-pointing arrow advances you to the next page. On the last page of the pdf is an upward-pointing arrow. Clicking on this arrow will move you to the beginning of the document.

### Keeping Important Documents with this Organizer PDF

At the beginning of each module will be a list of relevant important documents that we advise you have on hand. Here are a few good suggestions about organizing those documents.

Some people prefer to keep all documents in 'hard copy', not on the computer. If so, keep a list of documents in *Notes to My Family* with directions about where to find them. If that is you...

- Consider buying a plastic file box with a handle. These boxes are not too large and can be easily stored in a safe location.
- Consider a three-ring binder for storing all your documents with tabs to separate the different sections.
- If you have a safe in which to store your documents, be sure to include the combination to the safe in *Notes to My Family*.

Some people prefer to scan documents to their computer. If that is you...

- Save your computer folders in one main folder labeled *Notes to My Family*
- Create sub-folders for each *Notes to My Family* module and name each document folder accordingly, such as *About You and Your Family: Documents*
- Consider creating a password protected folder so only the right people can access your information

It is very important to us that you protect your personal private information. We are providing a technical support appendix with specific directions on how to save documents on your computer with good security sensibility. While a technical document, it is there for your reference. It might be a good idea to go over it with someone who understands computers well so you feel confident that your information is protected.

## Saving Your PDFs

Once you have downloaded a PDF onto your computer, you can save it (and the contents typed into it) at any-time by choosing **File > Save** from the top menu bar in your PDF reader software. You can then open the PDF at a later date and continue adding information. Each PDF will automatically save as the title, for example, *About You and Your Family*.

We recommend that you choose **File > Save As** to save the PDF with a different name. For example, you might add your last name and the date edited to the PDF name, saving an updated copy of the PDF as *About You and Your Family **Your Last Name Date***. This might be useful when you are archiving multiple versions of the PDF.

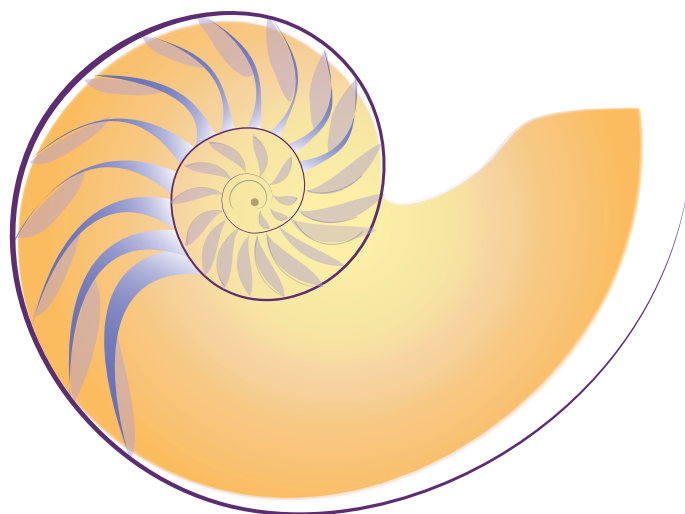
## About Hospice Giving Foundation

### Our Mission

**Hospice Giving Foundation** believes living well includes dying peacefully, in comfort, and with dignity. ***Advocating compassionate end-of-life care, we raise funds and award grants to strengthen local providers' ability to serve our community.*** We promote advance planning so families can prepare for and access choices for end-of-life care.

**Hospice Giving Foundation** envisions our community as a leader in delivering top-quality end-of-life care. We support this vision by awarding grants to qualified non-profit providers of end-of-life care in Monterey and San Benito Counties. Since 1997, Hospice Giving Foundation has awarded grants in excess of \$22 million investing in a broad scope of services and programs. This support touches so many lives in our community—the patients and their families, caregivers, and professionals.

We are unique in what we fund. This allows us to be a strong voice for a difficult topic. This Foundation supports innovation and active dialogue about dignified family and patient-centered end-of-life care. Grants support hospice and palliative care, grief support, specialized services for terminally ill children and their families, and services for those with terminal medical conditions such as Alzheimer's disease. We provide outreach and education so families can plan for the end of life. Through our grants, educational outreach, and tools such as *Notes to My Family*, Hospice Giving Foundation supports access to end-of-life care, while giving hope to families and peace of mind to our community. The ongoing generosity of our community makes this possible. We know you will see the value in providing dignity and compassion, and express your gratitude through giving.



# HOSPICE GIVING FOUNDATION

# Emergency Contact Information

## In the event of an emergency

Who are the first people to call:

**Name:**

**Phone 1:**

**Phone 2:**

**Relationship:**

**Name:**

**Phone 1:**

**Phone 2:**

**Relationship:**

List any medical alerts or allergies:

Who has legal authority to make decisions for you:

**Name:**

**Phone 1:**

**Phone 2:**

By what means:

**Medical Power of Attorney**

**Other:**

List the contact information for your Primary and / or Specialist Physician(s):

**Name:**

**Phone 1:**

**Phone 2:**

**Name:**

**Phone 1:**

**Phone 2:**



## Emergency Document Finder List

- POLST (Physician Orders for Life Sustaining Treatment)
- Durable Power of Attorney for Healthcare
- Legal Power of Attorney
- Medication and Allergy List

Friends and neighbors are there to help during an emergency or serious illness. Consider who will do these things. Be sure to include their phone numbers.

### For parents of minor children:

Who will care for your children:

**Name:**

**Phone:**

**Relationship:**

### Who will:

Bring you clothing:

**Name:**

**Phone:**

Make the calls:

**Name:**

**Phone:**

Care for your pet:

**Name:**

**Phone:**

Pay your bills:

**Name:**

**Phone:**

Clean up and lock your home: **Name:**

**Phone:**

## Glossary

### **Advance Care Directive**

A legal document that allows you to set out written wishes for your medical care and to name a person to make sure those wishes are carried out.

### **Beneficiary**

The person(s) or organizations(s) that benefits from a Will or Trust.

### **CPR**

Cardiopulmonary resuscitation (CPR) is a lifesaving technique useful in many emergencies, including heart attack or near drowning, in which someone's breathing or heartbeat has stopped.

### **Conservatorship**

A legal arrangement that gives an adult the court-ordered authority and responsibility to manage another adult's financial affairs.

### **Do Not Resuscitate Order (DNR)**

This is a legal document that prevents medical personnel from doing cardiopulmonary resuscitation (CPR) to prolong or save your life.

### **Durable Power of Attorney for Health Care**

A legal document that you can use to give someone permission to make medical decisions for you if you are unable to make those decisions yourself. The person you name to represent you may be called your agent, attorney-in-fact, health care proxy, patient advocate, or something similar, depending on where you live.

### **Estate**

An estate is the total accumulation of an individual's assets. There are different subsets of an estate. A probate estate includes all of the assets that must be processed in a probate or court proceeding. A trust estate includes all assets that are held by a trust. A taxable estate includes all assets that are subject to estate tax.

### **Estate Plan**

An estate plan is the preparation of a plan to carry out the administration and disposition of a person's property according to their wishes before or after their death. The goal of an estate plan is to preserve flexibility for the individual as well as to preserve the maximum amount of wealth possible prior to death, in accordance with federal and state tax law.

### **Estate Planning**

Estate planning is the process of anticipating and arranging for the transfer or disposition of assets in anticipation of, or after, a loved one's death.

### **Executor**

A person who administers the estate of a deceased person. The executor is responsible for gathering all of the decedent's assets and giving them to the appropriate beneficiaries.

### **Fiduciary**

A person or entity with the legal duty to act primarily for another's benefit.

## Guardian

A person who has the legal authority to make healthcare decisions and to manage property and financial matters on behalf of another person. A guardian can be appointed by the court in the absence of a healthcare agent.

## Organ Donor Form

If you choose to be an organ donor, this legal form provides proof that you want to donate organs or tissue after your death.

## POLST

Physician Orders for Life Sustaining Treatment is a form that clearly states what kinds of medical treatment a person wants, including extraordinary measures (such as a ventilator or feeding tube) and CPR. Printed on bright pink paper, and signed by both a doctor and patient, POLST helps give seriously-ill patients more control over their care. POLST must be signed by you and your physician (or in California by your nurse practitioner or physician's assistant effective 2016) to be legally binding.

## Power of Attorney

A document that gives another person legal authority to act on your behalf. If you create such a document, you are called the principal, and the person to whom you give this authority is called your agent or attorney-in-fact. If you make a durable power of attorney, the document will continue in effect even if you become incapacitated.

## Probate

The court-supervised process following a person's death that includes:

- proving the authenticity of the deceased person's will
- appointing someone to handle the deceased person's affairs
- identifying and inventorying the deceased person's property
- paying debts and taxes
- identifying heirs, and
- distributing the deceased person's property according to the will or, if there is no will, according to state law.

## Trust

A legal agreement in which property is held and managed by a Trustee for another person. The person who creates the trust is the settlor. The person who holds the property for another's benefit is the trustee. The person who is benefited by the trust is the beneficiary.

## Trustee

The individual or company who manages assets in a trust on behalf of the beneficiary. Typically, during a lifetime, the person who established the trust is the initial trustee.

### Successor Trustee or Alternate Executor

Can be a bank, private fiduciary, family member or other trusted advisor or friend.

## Will

A legal document stating the intentions of a deceased person concerning the distribution of their property.



Your *Notes to My Family* documents may contain lots of sensitive information. You may want to password protect their contents. Note that we accept no liability for any loss of, or unauthorized access to, your *Notes To My Family* documents.

## Free Password Protection on iOS Computers (Apple iMacs, etc.) Using Preview

(Note: the procedure may vary depending upon the version of Preview and version of operating system you are using.) If you are using an Apple computer with the free file display Preview installed, you can easily password protect any PDF. A user will need to know the password in order to view the file. One important caveat, however: once the PDF is saved using Preview, when you open it to edit once more, Preview creates a copy of the file for you to change - which you will then again save with a password. When the time comes to update again, repeat the process.

### *To use Preview to password protect your PDF:*

- Open the PDF using Preview.
- Fill out the PDF form fields.
- Choose File > Export
- At the top of the window that appears, enter a filename for the PDF and then, navigate to the folder where you want to export the file.
- For “Format” choose PDF, and for “Quartz Filter” choose None.
- At the bottom of the window, check the box that’s labeled “Encrypt”
- Enter and the re-enter your password in the fields that appear.
- Click Save.

## Password Protection Using Adobe Acrobat Standard for Mac or PC Users

(Note: the procedure may vary depending upon the version of Acrobat you are using and your computer platform.) Adobe Acrobat Standard can be purchased for a low price via a 1-month subscription to Adobe Creative Cloud. Once subscribed you can use Adobe Acrobat Standard to open and password protect the PDF. A user will need to know the password in order to view and / or edit the file. Once password protected, the document keeps that protection forever even if you cancel your Creative Cloud subscription. This password protection is a two-step process, and should be undertaken with care.

We suggest you create a password longer than 14 characters, with upper and lower case letters, symbols, and numbers. You might also want to use a secure password-keeping program to store your password.

### *Step 1 adds the password protection permissions to the PDF*

- To add encryption functionality to your PDF:
- Open your PDF and choose Save As
- In the dialog box which appears, choose Restrict Editing. A new dialog box appears, which asks you to create and then verify a Permissions Password.
- Enter the password, click OK, and then save your PDF.

### *Step 2 allows you to determine which functionality (viewing, editing, printing) is password protected.*

- Open your PDF once more. You’ll notice that the filename now has the word SECURED after it in parentheses.
- Choose Properties from the File menu.
- In the dialog box which appears, make sure the Security tab is selected at the top of the box, and then, that Password Security is selected from the dropdown menu next to Security Method.
- Click the Change Settings button and you will be prompted to enter the password you just created in Step 1.
- A new dialog box appears. Use this dialog box to set passwords for viewing, editing, or printing the PDF.

*End of NTMF Introduction PDF*