



Decisions

Not Just Between God and Me

A Life-Planning Aid for
Christians and Their Families



THE ENDOWMENT FUND
OF



Table of Contents

Letter from the Rector	Page 4
Introduction	Page 5
Endowment Fund, Legacy Society and Bequests	Page 6
Considerations	Page 7
Personal Information extensive biographical information, location of items, instructions for care of young children and for care of pets	Page 8
Legal and Financial Documents pertinent names and addresses, location of documents, account information, assets and liabilities, and Advance Medical Directive	Page 15
Medical History and Information	Page 18
Funeral Information letter to those making funeral arrangements and memorial preferences	Page 21

From the Rector

Around the time my first child, Isabelle, was born, a trusted friend encouraged Melody and me to get our estate in order. He said we needed to have a will, and provide binding legal guidance for how she would be cared for in the tragic event that Melody and I both died. I will admit that, at least at first, we scoffed at the idea. We are healthy, young (we feel less so now!), and not the least concerned with our deaths. Yet over succeeding months, the wisdom of that friend's counsel took root, and we eventually did prepare our will and make decisions about our estate. Doing so felt good and right and holy, and gave us a chance to begin imagining the day when we will no longer inhabit this world.

Unfortunately, I've met many individuals during my years as a priest who have resisted the idea of preparing their estate for the inevitable eventuality of their death. Perhaps they've not wanted to confront the painful truth of their mortality. Perhaps they've just "never got around to it." Either way, it's a mistake.

I experienced the humbling power of signing my will—an acknowledgement that one day I, too, will "go down to the dust." It is a difficult, sobering, and even heart-twisting, moment. Yet I believe that, as *The Book of Common Prayer* so eloquently puts it, "even at the grave we make our song, 'Alleluia! Alleluia! Alleluia!'" And for me, my joy at the hope of resurrection, of life beyond the grave, involves my ability to wisely and generously provide for those who will live on after me.

We are resurrection people. We believe that the grave is not the end of our story; it is not the period at the end of the sentence of our lives. There is more that awaits us, more life in the nearer presence of God. But it's like the bumper sticker says, "You can't take it with you when you die." Our wealth and possessions are no good to us in death, and life eternal with God doesn't involve our 401k or stock portfolio.

My deep and fervent hope is that you will take this document seriously, and utilize its many resources intended to help you make wise and prudent decisions—and not only about the end of your life. The information and tools inside will assist you in preparing for a variety of difficult situations and decisions. And I hope that, as you dig deeply into this work, you will receive the faith and courage to let go of the things of this world, even if you won't necessarily be alive to witness the fruits of your generosity.

If I can be of any help to you in this effort, please contact me. This is a spiritual act of the highest order, and I would be honored to support and assist you.

A handwritten signature in black ink that reads "Casey Shobe" with a small cross-like mark at the end of the line.

The Reverend R. Casey Shobe

Introduction

The “Decisions” – Not Just Between God and Me File was inspired and created by the Church of the Transfiguration Endowment Fund Trustees and is offered to help bring peace to you and your loved ones during stressful times. It was inspired by attending the Consortium of Endowed Episcopal Parishes (CEEP) conference, a national Episcopal organization whose member churches have significant endowment funds. Many CEEP parishes offer a similar document to their members, and their parishioners’ comments have been quite positive about this endeavor. It is also intended to help you make provisions for your affairs as directed on page 445 of the *Book of Common Prayer*;

The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.

“Decisions” is intended to help you organize and prepare documents which will put your affairs and desires in one place for your loved ones when you are sick or when you die. This is a booklet for anyone who wants to make things easier for family and friends in case of emergency.

DISCLAIMER: THIS INFORMATION IS NOT A LEGAL DOCUMENT AND DOES NOT TAKE THE PLACE OF A WILL OR ANY OTHER ESTATE DOCUMENTS. You should leave this document in a readily accessible location known to your executor and/or next of kin. Safe deposit boxes are sealed at a person’s death and are not a good place to leave documents which may need to be accessed immediately.

For questions, please contact a member of the clergy or a member of the Endowment Fund.

The Endowment Fund of the Church of the Transfiguration Bequests and the Legacy Society

*Like good stewards of the manifold grace of God,
serve one another with whatever gift each of you has received.*

- 1 Peter 4:10

In making estate plans, many people consider making a bequest or several bequests to worthy organizations or causes that have had significant meaning in their lives—such as a church, a medical research institute, a college or university, or a nonprofit agency.

Please prayerfully and thoughtfully consider leaving a bequest—a legacy gift—to the **Endowment Fund of the Church of The Transfiguration**, as thanksgiving for God's abundant love and for the work of the parish in seeking and serving Christ in all persons. The Fund, established in 1978 is not meant for ordinary operating expenses but is to be used for unexpected needs, opportunities, and emergencies. In addition to the general fund, there are two additional Endowment Funds—the **Outreach Endowment Fund** created in 2006 and the **Joanna Elizabeth Pierce and Justin Ford Pierce Fund for Youth Ministries**—created by Legacy Society member Jeff Pierce upon his death.

Over the years the Endowment Fund has supported many church related causes such as: providing scholarships enabling youth to attend life-changing pilgrimages to Scotland and to the National Episcopal Youth Event (EYE); renovation of the Youth Center; contributed to the building of a Habitat for Humanity House; participated in the acquisition of our current altar, and sponsored an Eagle Scout project to landscape the west parking lot. The Fund continues to sponsor the church's columbarium.

When you include the **Endowment Fund of the Church of the Transfiguration** as a beneficiary of your estate, you become a member of the **Legacy Society**. Established in 2012 with five founding individuals, there are now over 50 Society members. Your future gift can be a percentage of your estate, an outright gift of a stated monetary amount, an insurance policy or other gifts such as investable securities or oil and gas rights. You could join together with other Transfiguration members and create a legacy gift over a defined period of years. Perhaps you will even prayerfully consider “endowing your pledge.”

For more information about Planned Giving and the Legacy Society, please contact a member of the Endowment Fund or the Rector.

**Please consider leaving a legacy, as gratitude for the blessings God has bestowed upon you.
Be a part of Transfiguration's legacy of giving and be part of the future!**

Considerations

End of life planning is a critical step for all adults – young and old. This is especially true if you are parents with young children in your household. What happens when you don't get your affairs in order? You do have an estate plan however you may not like the one the government has in mind for you. "Default" rules will be applied to your affairs, regardless of whether those outcomes are what you would have chosen. Each person's wishes for end-of-life decisions are different and rarely are two sets of decisions the same. It's recommended that you consider meeting with an estate attorney, accountant, clergy member, physician, and any key family or friends who may become involved in end-of-life or post-death decisions involving your personal affairs. There are a number of educational tools that can also be found on this subject.

The following is not intended to serve as legal advice, but as a guideline of items to consider. The professionals listed above can assist with the applicability of utilizing the following items in your discussions with them:

1. **Last Will and Testament.** This document sets forth your key decisions with your property, any minors for whom you have custody, and other legal directives you desire to establish upon your death. Proper legal advice can assist with the types of nuances and internal formatting of a will, including use of trusts. Care should be considered when creating your own will, as there are strict legal requirements that must be adhered to in order for a will to be accepted in court. Some states do not recognize holographic wills.
2. **Living Will.** In cases where individuals are diagnosed with a known and existing terminal disease or illness, a living will expresses the wishes concerning end-of-life care relating to your illness. When considering this document, a meaningful discussion should occur with your doctor concerning what care might or will be expected so you can make an informed decision about the extent of the care you desire.
3. **Durable Medical Power of Attorney.** This is a document that designates another person to make medical decisions for you should you become unable to do so yourself. Again, you should discuss your wishes with whomever you appoint so he or she will stand ready to help you when you are unable to help yourself.
4. **Statutory Power of Attorney.** Much like a medical power of attorney, this document appoints someone to handle business, property or other non-medical issues for you. Like the other circumstances, you should discuss your wishes with whomever you provide this authority over your affairs.
5. **Organ Donation.** Organ donation is a critical function of society to aid others in need. You should consider and discuss your views on organ donation with those closest to you. Once you make a decision, you can make your election on your driver's license or other government identification.
6. **Wishes for Funeral, Burial or Cremation.** Often overlooked, many people fail to memorialize to others how they want to be cared for in death. This could include decisions on burial or cremation, as well as the type of service desired. Taking the time to be intentional about how you want to be celebrated and remembered will be invaluable to those you leave behind and leave less of a burden for them to handle.
7. **Life Insurance or Pension Documents.** If you or someone else has secured a life insurance policy or policies, those documents and policy numbers should be readily available. The same is true for pension or other benefits.
8. **Proof of Military or Other Organization.** Many people receive benefit or recognition for service in the Armed Forces or organizational membership. Should your service or membership (past or present) provide for those benefits, it is important to keep any documents evidencing your eligibility.

Lastly, it is vital not only to create and execute these documents, but to have them readily accessible. Many people take these documents and place them in a safe deposit box, never thinking that access to that box may be restricted. Many people create multiple copies and give them to family and friends who are involved in late-life or death decisions. Some create a file or notebook cataloging these materials. No matter how you retain them, the key is to have them accessible at a moment's notice.

Personal Information

Name

- Address: _____
- Social Security Number: _____
- Phone numbers: _____
- Gate lock, key location or combination: _____
- E-mail address and password: _____
- Birth date, place of birth: _____

Spouse, partner, or significant other

- Name: _____
- Address: _____
- Phone numbers: _____
- E-mail address: _____
- Birth date: _____

Emergency Contact

- Primary and Secondary contacts _____
- Name: _____
- Relationship: _____
- Address: _____
- Phone numbers: _____
- E-mail address: _____

Church

- Affiliation: _____
- Name: _____
- Address: _____
- Phone: _____

Marriage

- Date: _____
- Address: _____
- Wedding registered where: _____
- Location of marriage certificate: _____

Birth Information

- Date:_____
- Hospital Address:_____
- Birth certificate registration:_____
- Birth certificate location:_____
- Father's full name: _____
- Birth date/Place:_____ Living: ____Yes ____No
- Mother's full name: _____
- Birth date/Place: _____ Living: ____Yes ____No

Other Important Information

- Children's Guardians if applicable
 - Name_____
 - Address: city, state, zip_____
 - Contact Information_____
 - Pediatrician
 - ☐ Name_____
 - ☐ Contact information_____
- Pet Information: Who takes responsibility
 - Name_____
 - Contact Information_____
 - Veterinarian
 - ☐ Name_____
 - ☐ Contact No._____
- Safe deposit box
 - Location_____
 - Key Location_____
- In home safe
 - Key location or combination_____
- Military Service
 - Dates_____
 - Branch_____
- Will
 - Executor_____
 - Will Location_____ Last Executed_____

ASSETS

Checking, Savings:

Account numbers _____

Bank name and location _____

Are bills paid automatically to or from this account? ____ Yes ____ No; list:

Investment Accounts:

Trusts for which you are beneficiary:

Mortgages and debt owned by you:

Pensions, other retirement plans:



IRA and Keoghs:

Autos, Boats, RVs, etc:

Primary Residence:

Other real estate holdings:

Other:

Credit cards and loans which carry insurance on balance in case of death:

LIABILITIES

Mortgage(s):

Loans:

Auto(s):

Bank:

Other:

Credit and Charge Accounts:

Company	Contact Number	Account # & Pin

Persons dependent on you for support (name, type, amount and contact info):

Club and organization dues:

OTHER INCOME PRODUCING ACCOUNTS:

Name of Institution Type Account Number

- 1.

- 2.

- 3.

- 4.

Insurance Information: Insurance agent’s name and address:

POLICY INFORMATION:

Company	Amount	Certificate #	Beneficiary

Policy Location:



Legal and Financial Documents

My attorney

Name: _____

Address: _____

Telephone and email: _____

My accountant

Name: _____

Address: _____

Telephone and email: _____

My investment manager

Name: _____

Address: _____

Telephone and email: _____

My banker

Name: _____

Address: _____

Telephone and email: _____

My executor

Name: _____

Address: _____

Telephone and email: _____

My co-executor

Name: _____

Address: _____

Telephone and email: _____

LOCATION OF IMPORTANT DOCUMENTS

The following documents may be necessary in establishing rights to insurance, pensions, Social Security, ownership, relationship, etc. Indicate location for each item listed.

(H) Home (D) Safe Deposit Box (A) Attorney

Document	Location
Will	
Power of Attorney	
Trust agreements	
Adoption papers	
Military discharge papers	
Social Security Card	
Medicare and Medicaid Cards	
Real estate title(s)	
Mortgage papers	
Inventory of household goods	
Marriage license	
Divorce decree	
Passport or Citizenship papers	
Automobile title(s)	
Checkbook/Bank statements	

Tax papers for current year	
Tax returns for last 5 years	
Birth certificate/proof of age	
Pension information	
Insurance policies:	
> Life	
> Disability	
> Automobile	
> Homeowners	
> Excess Liability	
> Long-term care	
Stock certificates	
Long-term care facility contract	
Keys (Cars, Property, Desk, Filing Cabinets)	
Locks (combinations)	
Internet (Web page, User ID, Pin/Password)	

Medical Information

DOCTORS

Doctor's Name	Specialty	Address	Telephone

PRESCRIPTIONS

Date Begun	Name and Reason	Dosage	Prescribed By

THINGS TO KNOW

Item	Answer
Advanced Medical Directive Location	
Blood Type	
Allergies	
Chronic Illnesses	
Location of Health Insurance Card	
Location of Medicare Numbers and ID #	

Complete a copy of this page for yourself and anyone dependent on you for their medical care.

MEDICAL CONDITIONS

Condition	Yes	No	Condition	Yes	No
Allergies			Asthma		
Heart Disease or Heart Attack			Hay Fever		
Heart Failure			Sinus Trouble		
Angina Pectoris			Radiation Therapy		
Congenital Heart Disease			Chemotherapy		
Heart Murmur			Hepatitis A		
High Blood Pressure			Hepatitis B		
Arteriosclerosis			AIDS		
Mitral Valve Prolapse			HIV Positive		
Artificial Heart Valve			Blood Transfusions		
Heart Pacemaker			Hemophilia		
Heart Surgery			Anemia		
Arthritis			Sickle Cell Disease		
Rheumatism			Liver Disease		
Drug or Alcohol Addiction			Jaundice		
Stroke			Fainting or Dizzy Spells		
Artificial Joints			Nervous Disorders		
Kidney Issues			Tumors		
Ulcers			Developmental Disability		
Diabetes			Mental Illness		
Thyroid Issues			Special Diet		
Glaucoma			Cancer		
Emphysema			Other		

Describe below any other circumstances which should be known to anyone providing you medical care (surgeries, treatments, etc.)

List any medical history of parents and grandparents which could benefit your children or siblings with their personal medical care. This information should include ages and cause of deaths as well as possible hereditary, congenital or unusual medical problems or abnormalities.

MEDICAL HISTORY

Individual	Current Health	Date/Age at Death	Cause of Death
Father			
Mother			
Paternal Grandfather			
Paternal Grandmother			
Maternal Grandfather			
Maternal Grandmother			
Sibling			
Sibling			

Funeral Information

Please mail or deliver a signed copy of this section to:

The Rector
The Episcopal Church of The Transfiguration
14115 Hillcrest Road
Dallas, Texas 75254

Date: _____

My Name: _____

Address: _____

Telephone and email: _____

Medical directives which you would like to make known to the clergy of Transfiguration:

The first person to notify of my illness or death;

Name: _____

Address: _____

Telephone and email: _____

The person responsible for making plans for my funeral and burial:

Name: _____

Address: _____

Telephone and email: _____

My attorney:

Name: _____

Address: _____

Telephone and email: _____

Funeral Director:

Name: _____

Address: _____

Telephone and email: _____

I have made the following arrangements with this funeral director: _____

I prefer to _____ not to _____ be cremated.

My ashes are to be disposed of in the following manner (Note: Cremation does not affect the nature of the service or the place of burial): _____

I would like to be buried at: _____

The legal description of my cemetery lot is: _____

Coffin specifications: _____ least expensive _____ midrange _____ elaborate

My wishes for the headstone, ground plaque, and epitaph are: _____

I _____ do, _____ do not wish to have my coffin open when my friends visit.

THE FUNERAL SERVICE

If it pleases my family I would like the following type of funeral service:

	Rite I or Rite II
	Burial Office Only To Be Read
	Burial Office and Eucharist
	Church service with burial immediately following for family and friends
	Church service for family and friends with private burial later for family only
	Memorial service in church with burial either public or private as my family wishes
	Graveside service only

I would like the following clergy to officiate and/or assist at my service:

If it suits my family, I would like the following people to be invited to be pallbearers:

OTHER SERVICE PARTICIPANTS

You may wish to offer suggestions for some of the participants in the church service. If not, the church will have trained parishioners take care of these for you.

Crucifer	
Acolytes (2)	
Readers (1, 2 or 3)	
Lay Eucharistic Minister	
Ushers	

If my service is held in church, please play or sing the following hymns:

Please include some of the following lessons and Psalms in my service:

In lieu of flowers, I would like for my family and friends to consider memorial gifts in my name to:

I am to be an organ donor, the particulars of which are known to, or recorded at:

Special requests to my church and my clergy:

SignatureDate



Text and Hymn Selections

Old Testament and Apocrypha

- ☐ Isaiah 25:6-9 (He will swallow up death in victory)
- ☐ Isaiah 61:1-3 (To comfort all that mourn)
- ☐ Lamentations 3:22-26, 31-33 (The Lord is good unto them that wait for him)
- ☐ Wisdom 3:1-5, 9 (The souls of the righteous are in the hand of God)
- ☐ Job 19:21-27a (I know that my Redeemer liveth)

Psalms

- ☐ Psalm 23 (The Lord is my shepherd) Rite I or Rite II version
- ☐ Psalm 27 (The Lord is my light and my salvation: whom shall I fear?)
- ☐ Psalm 42 (As a deer longs for flowing streams, so my soul longs for you, O God)
- ☐ Psalm 90 (Lord, you have been our dwelling place in all generations)
- ☐ Psalm 116 (I love the Lord, because he has heard my voice and my supplications)
- ☐ Psalm 121 (I lift up my eyes to the hills – from where will my help come?)
- ☐ Psalm 130 (out of the depths I cry to you. O Lord)
- ☐ Psalm 139 (O Lord, you have searched me and known me)

New Testament Readings

- ☐ Romans 8:14-19, 34-35, 37-39 (Neither death, nor life...will be able to separate us from the love of God in Christ Jesus our Lord)
- ☐ 1 Corinthians 15:20-26, 35-38 42-48. 53-58 (Christ has been raised from the dead)
- ☐ 2 Corinthians 4:16-5:9 (So we do not lose heart)
- ☐ 1 John 3:1-2 (See what the father has given us)
- ☐ Revelations 7:9-17 (there was a great multitude)
- ☐ Revelation 21:2-7 (And I saw the holy city, the new Jerusalem)

Gospel Readings

- ☐ John 5:24-27 (Anyone who hears my word and believes him who sent me has eternal life)
- ☐ John 6:37-40 (Everything that the father gives me will come to me)
- ☐ John 10:11-16 (I am the good shepherd)
- ☐ John 11:21-27 (Martha said to Jesus, 'Lord, if you had been here, my brother would not have died')
- ☐ John 14:1-6 (Do not let your hearts be troubled)

The Hymnal 1982

- 151 From Deepest Woe I Cry To Thee (3)
- 194/195 Jesus Lives! The Terrors Now (4)
- 208 Alleluia! The Strife Is O'er The Battle Done (5)
- 287 For All The Saints, Who From Their Labors Rest (8)
- 326 From Glory To Glory Advancing (2)
- 338 Wherefore, O Father, We Thy Humble Servants (2)
- 354 Into Paradise May The Angels Lead You (2)
- 355 Give Rest, O Christ, To Your Servants (1)
- 356 May Choirs of Angels Lead You To Paradise On High (3)
- 357 Jesus, Son of Mary (4)
- 358 Christ The Victorious, Give To Your Servants (4)
- 429 I'll Praise My Maker While I've Breath (4)
- 444 Blessed Be The God Of Israel (3)
- 447 The Christ Who Died But Rose Again (4)
- 455/456 O Love Of God, How Strong And True (4)
- 487 Come My Way, My Truth, My Life
- 499 Lord God, You Now Have Set Your Servant Free (1)
- 517 How Lovely Is Thy Dwelling Place
- 560 Remember Your Servants, Lord (9)
- 620 Jerusalem, My Happy Home
- 621/622 Light's Abode, Celestial Salem (5)
- 623 O What Their Joy And Their Glory Must Be (5)
- 625 Ye Holy Angels Bright
- 635 If Thou But Trust In God To Guide Thee (2)
- 636/637 How Firm A Foundation, Ye Saints Of The Lord (5)
- 645/646 The King of Love, My Shepherd Is (6)
- 658 As Longs The Deer For Cooling Streams (4)
- 663 The Lord My God My Shepherd Is
- 664 My Shepherd Will Supply My Need (3)
- 665 All My Hope On God Is Founded (5)
- 666 Out Of The Depths I Call (4)
- 668 I To The Hills Will Lift Mine Eyes
- 680 O God, Our Help In Ages Past (6)
- 687/688 A Mighty Fortress Is Our God (4)
- 690 Guide Me, O Thou Great Jehovah (3)
- 692 I Heard The Voice Of Jesus Say

[illegible]



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