

End-of-Life

Passare and Y Collaborative

How-to Build Your End-of-Life Support Team

eBook #20

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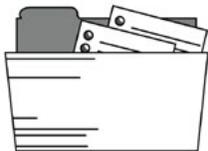
Life is always better when you have the dedicated support of others. This is especially true for End-of-Life. As you approach End-of-Life and after you pass away, you'll need trusted loved ones and advisors to help manage your final matters, from your final care and services to your personal assets. Identifying an End-of-Life support team is a comforting, important way to achieve peace of mind knowing that your final wishes will be honored at your End-of-Life.

As part of our eBook series, Passare™ shares resources and guidance to help you build your personal End-of-Life support team. Passare helps guide you through one of life's most important passages.



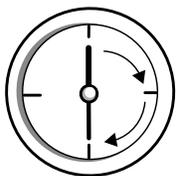
You Will Learn About:

1. What is an End-of-Life Support Team?
2. Benefits of an End-of-Life Support Team
3. Identifying Your Team and Their Roles
4. When and How to Choose Your Team
5. Creating Your End-of-Life Support Team
6. Summary



The eBook includes:

- A. End-of-Life Support Team Checklist
- B. End-of-Life Support Team Resource List



Estimated Time Required:

15 minutes

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What is an End-of-Life Support Team?

An End-of-Life Support Team is a group of personally selected people you trust to help you manage your important End-of-Life matters both before – and after you pass away.

Building your End-of Life support team involves asking yourself questions, evaluating choices and making decisions about whom you most trust to help you manage important End-of-Life matters, including:

- Ensuring your care choices are honored and medical decisions are made
- Managing and making decisions about your financial assets
- Ensuring that all of your estate's assets are distributed as you wish
- Caring for children or other dependents if you are unable or pass away
- Caring for pets, home and property if you are unable or pass away
- Advising you on legal matters like wills, estate plans or trusts
- Organizing your final services according to your wishes
- Informing your extended family, friends or social network of your circumstances
- Storing your important documents and online accounts

The people you choose to help you manage these final matters will become your End-of-Life support team. You can choose as many or as few support people as you need. You may find that choosing the same person to fulfill multiple roles works best.

The Benefits of an End-of-Life Support Team

People nearing End-of-Life often need a great deal of support. Choosing trusted loved ones and advisors to make important decisions when you most need help is essential for your peace of mind during this inevitable life passage.

One of the most important reasons to have an End-of-Life support team is to give someone you trust access to your End-of-Life plan and important documents so that your final wishes will be honored. Other benefits include:

- Reinforces your care plan
Identifying providers and having trusted representatives who can speak on your behalf helps ensure that you receive the type of care you want, where you want

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- Helps you stay connected
Personal connections often narrow as we age. Your support team ensures consistent, caring representation of your interests and provides confidantes with insights as you approach End-of-Life.
- Distributes responsibility
A support team helps reduce dependence on one person to manage your needs
- Provides for loved ones
Choosing guardians ensures that dependents will be cared for according to plan
- Ensures peace of mind
Reduces the decision-making burden on loved ones when you near End-of-Life or pass away
- Preserves family unity
A support team helps avoid conflict and encourages positive communication among family members
- Prepares for changes
Helps you plan for contingencies or changes to your End-of-Life plan
- Preserves assets
Helps protect your assets from probate court and estate taxes after you pass away
- Ensures decisions are honored
Gives you peace-of-mind that your End-of-Life matters will be honored



Take a few minutes to answer these questions.

1. How have your social or support contacts changed as you've aged?
2. Where are your financial assets, valuables and important documents stored?
3. How will your support team share the responsibility of supporting your interests toward your End-of-Life?

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Identifying Your Team and Their Roles

Your End-of-Life Support Team will include the people you personally select who will protect your interests and carry out your wishes. The number of people you choose will depend on your personal circumstances and preferences. You may find that choosing the same person to fulfill multiple roles works best.

Legal Team Members

As you near End-of-Life, it's important to appoint one or more people you trust to legally care for dependents, manage your medical and financial matters if you become unable and to ensure that your final wishes are carried out after you pass away.

Consider appointing the following people to manage legal matters if you become unable:

- **Healthcare Proxy (HP) or Medical Power of Attorney (MPOA)**
An HP or MPOA gives legal power to the person you appoint to make your healthcare or medical decisions if you are unable
- **Durable Power of Attorney (DPOA) or Financial Power of Attorney (FPOA)**
A DPOA or FPOA gives legal power to the person you appoint to act on your financial matters if you are unable
- **Legal Guardian for Dependent Children or Adults**
A legal guardian is a person you appoint to have legal responsibility to care for the personal and property interests of your dependents if you are unable
- **Attorney**
Your attorney can advise you or your representatives on End-of-Life legal matters

Consider appointing the following representatives to manage your legal matters after you pass away:

- **Executor**
An executor gives legal power to the person you appoint to carry out your final wishes for your physical estate in your will after you pass away
- **Digital Executor**
A digital executor is typically a person that you appoint to distribute or delete your digital assets according to your final wishes after you pass away

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Ask capable, trusted friends or family to accept responsibility for these important tasks. Visit www.passare.com and view the eBook, “[How-to Manage End-of-Life Planning](#)” for details on the legal forms necessary for your legal representatives to carry out your wishes.

Other Team Members

You may find it helpful to identify these other advisors, friends or loved ones:

- **Physicians or care providers**
You may choose preferred healthcare providers, long-term or in-home care providers, or hospice or palliative care providers who understand your wishes for your final care and living arrangements
- **Insurance agent, financial advisor and final services provider**
You may choose or consult with insurance agents to secure financial benefits for your loved ones, financial advisors or banking representatives to help you manage End-of-Life financial matters and/or a final services provider (often a funeral home) to help you manage your final services
- **Personal contacts**
You may choose family or friends to help care for your pets, home, manage mail, or bills, provide transportation to appointments, or to communicate with your community if you become unable
- **Alternate representatives**
Consider choosing at least one “backup” person that may step in if someone on your team is unable to fulfill his or her designated role



Take a few minutes to answer these questions.

1. What personal valuables, assets or heirlooms do you have?
2. Which loved ones or trusted advisors do you feel most comfortable sharing your final wishes with?
3. Which friends or neighbors can help communicate about your status and help with home care like collecting mail or watering plants?

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When and How to Choose Your Team

If you are creating an End-of-Life plan, it's a good time to think about your End-of-Life support team. It may take time to choose people, so start thinking about candidates.

Consider Your Needs

Begin by considering your personal needs. These questions may be helpful:

- Do you have dependent loved ones or pets that will need guardianship?
- Do you have health issues you that need to manage as you near End-of-Life?
- Do you have a business that you need to make decisions about?
- Do you own a home, property or digital or financial assets that need management if you become unable to make your own decisions?
- Do you need life insurance to help provide for loved ones after you pass away?
- Do you want your extended family, friends and social network to be informed of your circumstances if you become unable?

Consider Your Preferences and Resources

We recommend that you carefully consider who is best suited for each role. For example, the person you choose to be the legal executor of your estate may not have the technical skills to protect your digital assets.

These questions may be helpful as you consider who may best fit each role on your team:

- Consider what skills or capabilities are needed for each team member's role:

The legal guardian you choose should be financially able to care for your dependents and uphold your long-term wishes for their care

Your HP or MPOA should be accessible, available to travel and willing to support and defend your final care choices

Your FPOA should be able to manage, uphold and enforce your decisions about your financial matters without conflicted interests

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Your digital executor should be able to understand and manage the technical aspects associated with online accounts and social media

The legal executor defined in your will is the only person with legal authority to settle your physical estate

- Will my choices stand the test of time?
As you choose team members, think about how long and in what capacity you have known them. Consider how long you may need them to fill their respective role. For example, when choosing a legal guardian for your dependents it may be best to choose someone capable of caring for your minor dependents into adulthood.
- How will my loved ones feel about my choices?
Consider how your choices for team members may impact your family. For example, if a different person serves as your HP, FPOA, executor and legal guardian, make sure they can work together to carry out your final wishes.
- How do I ask my representatives to serve on my support team?
Asking advisors and loved ones to accept the responsibility of serving on your End-of-Life support team will take thoughtful planning. Consider the best time and place and how to approach the subject of building your End-of-Life support team. Get their input on how their lives might be impacted by your decisions. Be patient, flexible and willing to make changes or consider alternatives as needed.

Talk with Advisors and Loved Ones

To help you choose the right team member for the right responsibility, it may be helpful to get input from your loved ones and advisors before making your final decisions.

Find Additional Support Resources if Necessary

How do you build a support team if you have few social or personal contacts? Consider all possible support resources including close and extended family members, neighbors, healthcare and hospice providers, and contacts from your religious, professional or social organizations.

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You may be able to hire a Geriatric Care Manager (GCM) to manage some of your End-of-Life matters. GCMs specialize in elder care management and can assist in managing legal and financial matters. Your bank representative can advise you on setting up a bank trust to help manage your financial matters if you have not appointed an FPOA or executor. You may consider hiring an online service to manage your digital assets.

Choose Your Team and Complete Legal Forms

Once you have made decisions about who will fill what role on your support team, you will need to legally empower your representatives to carry out your wishes. We recommend that you complete a few legal documents. Visit www.passare.com and view the eBook, “[How-to Manage End-of-Life Planning](#)” for details on the legal forms necessary for your legal representatives to carry out your wishes.

Prepare a Support Team Contact List

Once your End-of-Life support team and the relevant legal documents are in place, prepare a complete contact list of all of your personal representatives. Include their full name, phone number and email address, as well as your association with them, their support role and any other pertinent information.

Copy, Store and Communicate

Once you’ve prepared a complete contact list of your End-of-Life support team members, we suggest you:

- Copy and store your list and documents
Give copies of your list to each member on your team and to other close family members or advisors. Store your list and all legal documents in a secure, accessible place. Consider storing document copies with one of your trusted advisors to ensure that your final wishes are carried out.
- Communicate with your team
Ask your End-of-Life support team to check in with one another when necessary to remain informed on your final matters. Let other loved ones know you have an End-of-Life support team.

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What to do if Your Circumstances or Team Changes

It's important to have a nimble team that can adapt as your circumstances change or if one or more team members can't fulfill their roles as you've planned.

Periodically check in with your team members to confirm that they are still able to fulfill their responsibilities. Identify another team member who may be able to serve in an additional role. Be open to new resources you may not have previously considered.



Take a few minutes to answer these questions.

1. Who among your trusted resources can you ask to help support your final care and manage End-of-Life financial matters?
2. In what ways can you approach the subject of building your End-of-Life support team with your prospective team members?
3. Where can you find more resources if you have few family members or limited social contacts to support you toward your End-of-Life?

Creating Your End-of-Life Support Team

We recommend the following steps to create your End-of-Life support team:

- Consider your specific needs
Consider your preferences and needs regarding health issues, property, financial or digital assets and if you want your extended family, social or online network to be informed of your circumstances if you become unable to speak for yourself.
- Weigh roles and skills
Carefully consider whom you trust to fill each role. Match the person with the role they seem best suited. You can choose the same person for multiple roles.
- Talk with advisors and loved ones
Ask for input from your loved ones and advisors before making your final decisions.

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- Find additional resources
Consider all possible resources including family members, religious contacts, neighbors, healthcare and hospice providers, and social contacts.
- Choose your support team
Appoint someone you trust to care for dependents, manage medical and financial matters and to carry out your final wishes after you pass away.
- Complete legal documents
Legally empower your representatives to carry out your wishes by completing legal documents. Visit www.passare.com and view the eBook, “[How-to Manage End-of-Life Planning](#)” for details on the legal forms you’ll need to complete.
- Prepare an End-of-Life support team contact list
Keep a complete contact list of all of your personal representatives with their full name and contact information, your association, and their support role
- Copy, store and distribute your contact list
Give copies of your list to each team member and to close family members or advisors. Store all legal documents in a secure place.
- Communicate with your team and loved ones
Let loved ones know you have an End-of-Life support team and how to contact them.

American poet Ralph Waldo Emerson said, “The purpose of life is to be useful, to be honorable, to be compassionate and to have it make some difference that you have lived and lived well.”

An important part of living a fulfilling life includes sharing and supporting others that you care about – and having them support you. By planning ahead, you can build a dedicated team of caring people who can help you manage End-of-Life matters as you approach this important and inevitable life passage.

Please visit: www.passare.com for more information and expert resources on building your End-of-Life support team and many other End-of-Life Management topics.

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Checklist: How-to Build an End-of-Life Support Team

We recommend the following steps to build your End-of-Life support team:



Consider your specific needs

The support team you choose will depend on your unique circumstances. Consider your needs, your dependents' needs, health issues, property, financial assets and whether you want your extended family, social or online network to be informed of your circumstances if you become unable to speak for yourself.



Consider your preferences and resources

Carefully consider who you trust to fill each role. Try to match the person with the role they seem best suited for. You may find that choosing the same person to fulfill multiple roles works best for you.



Talk with advisors and loved ones

To help you choose the right person for the right responsibility, get input from your loved ones before making your final decisions.



Find additional resources if necessary

Consider all possible resources including: family members, neighbors, healthcare providers, hospice providers, your religious community, or professional or social organizations.



Choose your support team

Appoint one or more people you trust to care for dependents, manage your medical and financial matters if you become unable, and to carry out your final wishes.

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Complete legal documents

Legally empower your representatives by completing any relevant legal documents and tasks.



Prepare a support team contact list

Keep a complete list of all of your personal representatives with their full name and contact information, your association with them, their support role and any other pertinent information



Copy, store and distribute documents

Give copies of your contact list to each member on your team and to other close family members or advisors. Store your list and all important legal documents in a secure, accessible place.



Communicate with your team and loved ones

Check in with your End-of-Life support team periodically. Let other loved ones know you have an End-of-Life support team and how to contact them.

Visit www.passare.com for more information and expert resources on managing End-of-Life Management topics.

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Your End-of-Life Support Team Resource List

To learn more about how to build and empower your End-of-Life support team, consider these resources:

American Bar Association: 1-800-285-2221 or www.americanbar.org

Donate Life America: 1-804-377-3580 or www.donatelife.net

U.S. Department of Health and Human Services: www.organdonor.gov

The Living Bank: 1-800-528-2971 or www.livingbank.org

National POLST Office: 503-494-3965 or www.polst.org

Aging with Dignity: 1-888-594-7437 or www.agingwithdignity.org

American Hospice Foundation: 1-800-347-1413 or www.americanhospice.org

Bosplace.org: www.bosplace.org or 713-942-8339

Caring Connections: 800-658-8898 or www.caringinfo.org

Caring.com: 1-800-973-1540 or www.caring.com

Center to Advance Palliative Care: 1-212-201-2670 or www.getpalliativecare.org

Eldercare Locator: 1-800-677-1116 or www.eldercare.gov

Family Caregiver Alliance: 1-800-445-8106 or www.caregiver.org

Hospice and Palliative Nurses Association: 1-412-787-9301 or www.hpna.org

Hello Grief Resources: www.hellogrief.org

Hospice Foundation of America: 1-800-854-3402 or
www.hospicefoundation.org/advancecare or www.hospicedirectory.org

National Association for Professional Geriatric Care Managers: www.caremanager.org

National Hospice and Palliative Care Organization: 1-800-658-8898 or
www.caringinfo.org or www.nhpco.org

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National Institute on Aging Information Center: 1-800-222-4225 or
www.nia.nih.gov/health www.nia.nih.gov/espanol

The Dougy Center: National Center for Grieving Children & Families:
www.dougy.org/grief-resources/ or: 866-775-5683

Centers for Medicare and Medicaid Services: 1-800-633-4227 or www.medicare.gov
or for Medicaid Spend Down information:
<http://www.medicare.gov/your-medicare-costs/help-paying-costs/medicaid/medicaid.html>

Social Security Administration:

For Social Security Income & Burial Fund information, go to:
<http://www.ssa.gov/ssi/spotlights/spot-burial-funds.htm>

For Special Lump Sum Social Security Death Benefit information, go to:
<http://www.ssa.gov/survivorplan/ifyou7.htm> or for Survivor's Benefit Fact Sheet, go
to: <http://www.ssa.gov/pubs/EN-05-10084.pdf>

US Department of Veterans Affairs:

For veterans benefits: 1-800-827-1000 or www.benefits.va.gov

For veterans cemetery and burial info: 1-800-827-1000 or
www.cem.va.gov/burial_benefits/

For veterans survivor's benefits info: 1800-827-1000 or
www.va.gov/opa/persona/dependent_survivor.asp

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From birth to death, life is a series of passages. Passare allows you to connect and collaborate with your family any time, anywhere to easily explore and plan for End-of-Life.

With Passare, you can engage with trusted End-of-Life experts and relevant resources that guide you through one of life's most important passages and ensure that the specific needs and wishes of you and your family are honored. Please visit www.passare.com for more information on how we can help simplify End-of Life Management.



Co-founder of [Y Collaborative](#), Nancy Rust is a Certified Senior Advisor and trained Hospice Volunteer. With deep knowledge & sensitivity, Nancy helps individuals, families and organizations by providing valuable resources and facilitating necessary conversations surrounding end-of-life issues. Visit [Y Collaborative](#) to learn more about how Nancy Rust and Y Collaborative can assist you

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