



Saint Andrew's  
EPISCOPAL CHURCH

## A Christian Prepares for Death



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*Name*

If you died tomorrow, would your family know whether you wanted to be cremated? Or where your important papers are?

Often a family doesn't know, and part of the education of a Christian is the process of preparing for death. Death is a part of the gift of life. God has in store for us more graces than we can imagine after death.

We are offering you this booklet so that you will take the time to make some decisions about how and where you want your burial services conducted and so that your family, friends, and executor(s) will have an easier time carrying out those decisions and making other necessary arrangements with the assurance of your written word to guide them. You may wish to consult a clergy person in the liturgical preparations.

Use this booklet in whatever way is helpful for you. If you don't want to fill out every line, there is absolutely no need to; this is a very general template with questions you might find helpful. But please keep this record up-to-date. Many changes occur in our lives each year, such as changes in marital status, births, deaths, address, etc. We suggest using pencil to fill out this booklet so that changes can be made easily. Perhaps on your birthday each year you could take a few minutes to make any changes or additions.

*Let someone know where this record is kept. We are willing to keep a copy at St Andrew's.*

**Do not keep it in your safe deposit box.** It should be kept with your important papers where it will be easily accessible to others. Be sure to provide instructions to key people about how to find it.

This booklet has been prepared by

\_\_\_\_\_ , on \_\_\_\_\_  
*please print name* *date*

*My health care proxy (authorized decision maker) is*

\_\_\_\_\_

**GENERAL INFORMATION**

*The death of a member of the church should be reported as soon as possible, and arrangements for the funeral should be made in consultation with the clergy of the congregation.*

*(Book of Common Prayer)*

Upon my death, please notify the clergy or warden of:

Church: \_\_\_\_\_

City, State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

I am an organ donor:

Yes \_\_\_\_\_ No \_\_\_\_\_

Restrictions \_\_\_\_\_

**FUNERAL ARRANGEMENTS**

Arrangements for the care of my remains have been made with the following funeral home:

Funeral Home: \_\_\_\_\_

City, State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Should my survivors want some sense of my preferences, they are included as follows.

I would like my remains to be buried in a casket ( ) cremated (either buried or scattered) ( ).

If cremated, I would like it to occur:

\_\_\_ As soon after death as possible

\_\_\_ After funeral services

The ashes should be interred or dispersed in the following manner (check state legalities.)

\_\_\_\_\_  
\_\_\_\_\_

*St Andrew's has a small memorial garden to the side of the church. If you would like your ashes to be interred there, please see the information on p. 14.*

I own a cemetery plot: \_\_\_\_ yes \_\_\_\_ no

Cemetery Name: \_\_\_\_\_

City, State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

The deed to the plot is located: \_\_\_\_\_

The following people know about these arrangements:

Name/Relationship: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number \_\_\_\_\_

If you have no pre-arranged funeral plan:

Casket/urn specifications: \_\_\_\_\_

I prefer to be buried (where): \_\_\_\_\_

I prefer my grave to be: marked ( ) unmarked ( )

I would like for my grave marker to read (check cemetery policy):

\_\_\_\_\_  
\_\_\_\_\_

*Veterans: Check with authorities because the government may provide a coffin and/or headstone.*

I do ( ) do not ( ) wish visiting hours at the funeral home.

I do ( ) do not ( ) wish my body to be present at the church service.

*Additional instructions:*

Special clothing: \_\_\_\_\_

Jewelry: \_\_\_\_\_

Dentures/hearing aids/glasses: \_\_\_\_\_

Other: \_\_\_\_\_

**FUNERAL OR MEMORIAL SERVICE INSTRUCTIONS**

*Baptized Christians are properly buried from the church. The service should be held at a time when the congregation has an opportunity to be present.*

Circumstances permitting, I wish my Burial Services to take place at:

Church: \_\_\_\_\_

City, State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

And/or a memorial service to be held at: \_\_\_\_\_

A funeral home service to be held:

Funeral Home: \_\_\_\_\_

City, State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

I would ( ) would not ( ) like a celebration of the Eucharist with the service.

I would like the following psalms and scripture readings used as part of the service.

*(See p. 10 for suggestions. If you have specific readers in mind, please indicate the person's name next to each reading.)*

Old Testament: \_\_\_\_\_

New Testament: \_\_\_\_\_

Gospel: \_\_\_\_\_

Psalm: \_\_\_\_\_

I prefer the following type of music:

Organ  Piano  Guitar  Strings  Flute  Choir  Soloist  no music

I especially like the following hymns (*see p.11 for suggestions*):

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Among the pall bearers, I hope that some of the following individuals may be included. (*There are usually six or eight—include contact info*)

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In lieu of flowers, I would prefer contributions be sent to:

Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone Number: \_\_\_\_\_

*Information on including your church or other charity in your will and other financial planning is found on page 12.*

In addition to the foregoing directions I would like:

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**BIOGRAPHICAL DATA** (*invaluable help for death certificates and in writing obituaries*)

*Your Information*

Full Legal Name: \_\_\_\_\_

Present Address: \_\_\_\_\_

City, State \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Birthplace: \_\_\_\_\_

*Parents' Information*

Full names: \_\_\_\_\_

Places and Dates of Birth \_\_\_\_\_

Deceased (if yes, include date). \_\_\_\_\_

If living, address: \_\_\_\_\_

*Information on Family Members: children, spouse, siblings, close friends to be notified*

Your present marital status:

Single     Married/Partnered     Widowed     Divorced

Full name with unmarried name: \_\_\_\_\_

Relation \_\_\_\_\_

Place and Date of Birth \_\_\_\_\_

Deceased (if yes, include date) \_\_\_\_\_

If living, address: \_\_\_\_\_

Full name with unmarried name: \_\_\_\_\_

Relation \_\_\_\_\_

Place and Date of Birth \_\_\_\_\_

Deceased (if yes, include date) \_\_\_\_\_

If living, address: \_\_\_\_\_

Full name with unmarried name: \_\_\_\_\_

Relation \_\_\_\_\_

Place and Date of Birth \_\_\_\_\_

Deceased (if yes, include date) \_\_\_\_\_

If living, address: \_\_\_\_\_

*Other Relatives and Friends*

Please notify immediately (make a list and attach it here):

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Relationship: \_\_\_\_\_

Please notify by letter:

Name: \_\_\_\_\_

Address: \_\_\_\_\_



**LAST WILL AND TESTAMENT**

I do ( ) do not ( ) have a will.

The original of my will is located: \_\_\_\_\_

It is dated: \_\_\_\_\_

**Life Insurance**

I do ( ) do not ( ) have life insurance. Information about the policy:

Insurance Company: \_\_\_\_\_

Policy Number: \_\_\_\_\_

Policy Type: \_\_\_\_\_

**Benefit Plans**

I participate in the following benefit plan(s) (e.g., pension, 401K, retirement):

Plan Name: \_\_\_\_\_

Organization: \_\_\_\_\_

**Other information not included elsewhere in this booklet:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Suggested Lessons from Holy Scripture from *The Book of Common Prayer*  
for Funeral and Memorial Service Planning**

*This is not an exclusive list.*

*If you would prefer a text not listed here, it may be used instead.*

*Old Testament*

Isaiah 25:6-9

Isaiah 61:1-3

Lamentations 3:22-26, 31-33

Wisdom 3:1-5, 9

Job 19:21-27a

*New Testament*

Romans 8:14-19, 34-35, 37-39

1 Corinthians 15:20-26, 35-38, 42-44, 53-58

2 Corinthians 4:16-5:9

1 John 3:1-2

Revelation 7:9-17

Revelation 21:2-7

*Gospel*

John 5:24-27

John 6:37-40

John 10:11-16

John 11:21-27

John 14:1-6

Luke 6:20-22

*Psalms:*

Selected verses from

Psalm 23

Psalm 27

Psalm 42

Psalm 46

Psalm 90

Psalm 106

Psalm 116

Psalm 121

Psalm 130

Psalm 139

## HYMNS

The following hymns are suggested as being particularly appropriate for the Burial office. They are by no means the only possibilities, and many hymns of a more general nature may also be suitable. These listed are all from the *Hymnal 1982*. Music from other hymnals may also be used.

- 194 Jesus lives! thy terrors now
- 208 Alleluia! The strife is o'er
- 287 For all the saints
- 293 I sing a song of the saints of God
- 356 May choirs of angels lead you
- 388 O worship the king
- 447 The Christ who died but rose again
- 457 Thou art the Way
- 526 Let saints on earth in concert sing
- 618 Ye watchers and ye holy ones
- 620 Jerusalem my happy home
- 625 Ye holy angels bright
- 635 If thou but trust in God
- 637 How firm a foundation
- 645/6 The King of love my shepherd is
- 658 As long as the deer for cooling streams
- 663 The Lord my God my shepherd is
- 668 I to the hills will lift mine eyes
- 671 Amazing grace
- 680 O God, our help in ages past
- 687/8 A mighty fortress is our God
- 690 Guide me, O thou great Jehovah

Equally suitable, though perhaps less well known:

- 189 Love's redeeming work is done
- 338 Wherefore, O Father, we thy humble servants
- 379 God is Love, let heaven adore him
- 487 Come, my Way, my Truth, my Life
- 492 Sing, ye faithful, sing with gladness
- 517 How lovely is thy dwelling place
- 665 All my hope on God is founded
- 692 I heard the voice of Jesus say

# THE MINISTRY OF GIFT PLANNING

*"In the beginning, God created the heavens and the earth" (Genesis 1:1)*

This simple statement at the beginning of the Bible establishes once and for all the immutable relationship between ourselves and the world around us. All that we are, all that we have, comes from God and will one day return to God. Jesus often talked about our relationship to the "things" we possess. In Luke 12:13-21 Jesus is asked about dividing a family inheritance. He replies with a story. A rich man decides to build new barns to hold his bumper crop, then to "eat, drink, and be merry." However, "God said to him, 'Fool! This night your soul is required of you; and the things you have prepared, whose will they be?' So is he who lays up treasure for himself, and is not rich toward God." We are stewards of God's bounty--caretakers. For a brief period we are given time, energy, and resources. What we do with these gifts ultimately defines the character of our life and the depth of our spiritual understanding.

*Note that the information in this document is of a very general nature; please speak to your financial planner or another expert for more information about this process.*

## **What is Gift Planning?**

Gift planning encompasses a variety of ways that gifts can be made to the church from accumulated resources. It usually involves financial or estate planning; however, it is not reserved for the wealthy. Gift planning is a means by which anyone concerned with the wise use of his or her personal resources makes a considered choice about their ultimate disposition.

Gift planning establishes a way for a donor to provide for family members while remembering the church as well. It often enables the donor to provide more for his or her heirs and to make a larger gift than thought possible. It often reduces taxes. Planned gifts can be designated for an organization's general fund or for its endowment. Planned gifts are either outright gifts (i.e., gifts of appreciated securities, real property, personal property, etc.) or deferred gifts (i.e., charitable gift annuities, charitable trusts).

## **A Bequest in a Will**

Perhaps the easiest and the most common way of making a planned gift is through your will. Yet some 50 to 70% of all church members die without one. If you die without a will, the state will divide your assets among your spouse and children (regardless of their age); appoint an administrator that may cost the estate large fees; and appoint guardians, who may or may not have been your choice, for your minor children. The state makes no charitable contributions, and it will ensure that your estate pays as much tax as possible. By making a will, you appoint your own administrator; you name the guardian of your minor children; you control applicable taxes; you can create a family or charitable trust; and you can share your resources with your family, church, or other institutions as you choose. A bequest in a will can take the form of a set amount of money, a percentage of an estate, a specific asset, a trust, or the naming of a church related organization as a contingent beneficiary. Sample language for including the church in your will might be: "I give,

devise, and bequeath (state amount, asset, or percentage of the estate) to (name and address of your church) to be used (describe use) or as the church's governing board or vestry deems appropriate."

### **Life Income Gifts**

Life Income Gifts provide you or your designated beneficiary an income for life in exchange for your gift. They can be established in several ways, the most common of which includes the Episcopal Church Foundation's Pooled Income Fund, a Charitable Gift Annuity, and a Charitable Remainder Trust. In the **Pooled Income Fund**, gifts are "pooled" with other gifts and invested in a professionally managed investment portfolio. The benefits of establishing a **Charitable Gift Annuity** are similar to that of the Pooled Income Fund with the following differences: The income for life is guaranteed at a fixed rate; a portion of the gift is deductible from income taxes; and some of the income received would be tax exempt. A **Charitable Remainder Trust** involves larger sums of money and is individually managed.

### **Gifts of real estate, appreciated property, and tangible personal property**

Real estate or securities can be the source of your gift to the church. Using a **Charitable Life Estate Contract**, for example, you can deed your home, vacation home, farm, ranch, or condominium to the church and retain the right to live on the property and/or receive income from the property for as long as you live. You receive an income tax deduction when the property is deeded to the church and avoid any capital gains taxes when making the transfer. Your inheritance and estate taxes may be reduced at the time of your death. Gifts of appreciated real estate or securities allow you to avoid capital gains taxes. It is important to transfer the stock or real estate to the church prior to selling it. However, if the securities or real estate have decreased in value, you should sell the assets before making the gift, thus establishing a capital loss and a potential tax deduction. Gifts of tangible personal property, such as jewelry, coins, works of art, automobiles, etc. may also be given to the church. You are responsible for setting an appraised value on the gift. Any gift over \$5,000 must be independently appraised.

### **Gifts of Life Insurance**

Life insurance is another way to make a sizeable gift to the church. For example, you can purchase a new policy and make the church the owner and beneficiary of the policy. This enables you to "leverage" your gift, ultimately making a much larger gift than otherwise possible. Contributions to your church to pay the ongoing premiums become tax deductible. You can make the church the owner and beneficiary of an existing policy. The current value of the policy is tax deductible, as are future premium payments. You can make the church a contingent beneficiary of an existing policy, i.e., name the church to receive the proceeds of the policy if the designated beneficiaries predecease the insured. Also, you can use life insurance in conjunction with another planned gift. For example, you can purchase life insurance with the income received from a life income trust, thus replacing, and in some instances, surpassing, the principal removed from the estate by the gift.

## **ST ANDREW'S MEMORIAL GARDEN**

St Andrew's has a small memorial garden to the west of the church. Members of St Andrew's and their family members and friends of the congregation are eligible to have their ashes interred there. Ashes are returned to the earth with no urn, and spaces are not marked. Names may be engraved in the Memorial Garden plaque arrangement in the church.

### **St Andrew's Episcopal Church**

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**The information on planned giving is reprinted from "The Ministry of Gift Planning," created by the Episcopal Church Foundation.**

**<https://www.ecf.org>**