

**Step-by Step
ROADMAP
For End-of-Life Planning**

Workbook

MODULE 1:

1. What are your big “Whys” for end-of-life planning? List your goals for doing this course and completing your plans for the end-of-life.

2. What are your barriers to making end-of-life plans? What holds you back from planning and talking about the end-of-life?

MODULE 1:

Optional Action Steps

- Update your Will**

- Update your Estate Plan**

- Investigate long-term care insurance**

- Think ahead about possible housing for your future. List your options – how will you prepare for this life change?**

- Plan your funeral**

- Plan your burial or cremation**

MODULE 2

ACTION STEPS

1. Complete Personal Values Assessment

1. Make a list of 10 things you value most in life (include relationships, activities, possessions, beliefs, etc.) Spend some time really thinking about this ... if you had to give up *everything* except these 10 things, what would you most want to keep in your life?

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

2. Next, imagine that you have only 6 months left to live. Review your list of values above. Is it still the same? Would you replace any of those 10 items with something else? If so, make those changes now.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

3. Now, arrange your list of values in order of priority, with #1 being the most important to you and #10 being the least important on that list. *(This can be challenging but do your best - it's just an exercise to get you to think about what really matters to you!)*

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

The purpose of this exercise is to help you identify **what really matters to you** and to begin to think about the last days of your life. You will need to be clear about your values and goals as you make decisions and plan ahead for the end-of-life.

It is also important to recognize that **life has no guarantees** - none of us knows how many days of life we have left to enjoy. If there is a big gap between what you value right now and what you will value at the end of your life, you might want to think about that!

Finally if you have identified that you have **significant fears about dying** you may want to do some work on those fears before you continue with this process.

Read the **BONUS Article** and follow the recommendations:
“6 Steps to Rise Above Your Fear of Death”.

Assess Your Beliefs

1. Begin by reading the **BONUS Article:**
"5 Keys for Finding Meaning in Later Life."
2. Using the list you've already made of the 10 things you value most in life, consider which of the items on that list give your life the most *meaning*. Rearrange your list if necessary so that the most meaningful items are at the top.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

3. Next to each item on your list write down how much time you give in a day, week, or month to those people or things that have the most meaning for you.
4. Then answer these questions: Are you spending your time engaged in meaningful activity? Or does a significant amount of time get consumed by things that don't really matter to you?

5. Think about your life up to this point: do you feel your life has had a purpose so far? Do you see a purpose for the rest of your life? What could you be doing right now to find greater *meaning* and *purpose* in each and every day?

6. Next write down your **Beliefs** about death and dying. Do you believe in an afterlife? Or do you feel that life comes to an end when death occurs? If you follow a particular religion do you know what your religion teaches about death and dying? (*This will be important information for you to have when we get to the next step.*)

7. Finally, imagine that you are in the last few hours of your life and write about these questions: **Where do you want to be? Who do you want to be with you?**

(Tip: It can be helpful to simplify your end-of-life planning to just these two questions as a starting point. Then you can work backwards from here as you make additional decisions. For example, if you envision dying in your own home, then you will know to avoid any treatments that would require you to be in a hospital.)

MODULE 2

ACTION STEPS (cont'd.)

2. Complete the **Conversation Starter Kit** using the **Get it Done AUDIO** as a guide
3. Complete the **Checklist for End-of-Life Planning**
4. Gather the necessary documents listed in the Checklist
5. Create a storage file for your paperwork
6. BONUS Content:
 - a. (Article) 5 Keys to Finding Meaning in Later Life
 - b. (Audio) The Conversation Project Interview
 - c. (Audio) What Really Matters

MODULE 3

CHOOSE YOUR PAPERWORK

AGE	HEALTH STATUS	PROXY	LIVING WILL	POLST
18-40	Healthy	X		
	Chronic Illness	X	X	
	Terminal Illness	X	X	X
41-65	Healthy	X	X	
	Chronic Illness	X	X	
	Terminal Illness	X	X	X
>65	Healthy	X	X	
	Chronic Illness	X	X	
	Terminal Illness	X	X	X

MODULE 3

ACTION STEPS:

1. Download and Print the ADVANCE DIRECTIVE Forms for your state or province:
 - a. US: www.CaringInfo.org
 - b. Canada: www.Cindea.ca
2. (OPTIONAL) Download and Print the FIVE WISHES form (or complete online):
 - a. www.AgingWithDignity.org
3. WATCH Videos and LISTEN to Audios as you complete the forms:
 - a. Choosing a Healthcare Proxy (Video)
 - b. Completing Your Living Will (Video)
 - c. Facts About CPR (Video)
 - d. Five Wishes (Audio)
4. BONUS Content (Optional):
 - a. (Article) 6 Mistakes to Avoid When Doing Your End-of-Life Planning
 - b. (Audio) It's OK to Die – Interview with Dr. Monica Williams-Murphy

7. BONUS Content:

- a. (Article) Tips for Talking to Your Loved Ones About the End of Life
- b. (Audio) How to Talk to Your Healthcare Provider About Your End-of-Life Wishes

