

# HERITAGE OF HOPE CHECKLIST

## HOME FREE: Embracing Life in Jesus & Ordering Your Affairs

- Ponder your mortality and be sure of your ultimate destination (John 14:1-4). Are you *home free* as described in Eph. 1:13-14 of the Message?
- Identify your support. Select a Guardian for minor children, an Executor or Successor Trustee for your estate, and a Medical Representative for yourself.
- Go to <https://finishlifewell.org/store>, and download 3 forms: The Heritage of Hope Checklist, The Letter of Last Instructions, and the Estate Inventory Form.
- You may find it helpful to fill out the Letter of Last Instructions and the Estate Inventory Form together as you will be referencing many of the same accounts.
- This is a good time to collect, update, and organize all important papers in a safe, secure place. Use the Letter of Last Instructions Form to be sure your spouse, Executor or Successor Trustee will have appropriate access.
- Finally, consider ownership. Is it your estate or are you God's money manager?

## HOUSEHOLD: Extending God's Gifts with Legal Tools

- Calculate your net worth or the value of the estate you manage for God. Review the current ownership and beneficiaries of each asset. Which non-profits and charities do you support? How might you best bless each family member?
- Secure agreement and commitment from a competent person willing to serve as your Executor or Successor Trustee. Empower them with a Power of Attorney for Finances and detailed instructions via the Letter of Last Instructions.
- Secure agreement and commitment from a competent person willing to serve as your Health Care Representative and empower them with a Medical Power of Attorney or Advance Directive. Avoid crisis, conflict and confusion by informing this person (and family members) of your wishes for your care before life's end.
- Consult competent counsel—an estate planner, an accountant, and/or an attorney—to explore transfer strategies. Per Ken Baker, "Talk to somebody!"
- Finalize your decisions with legal documents. Get these signed, notarized and delivered. Equip your Medical Representative and your Executor or Successor Trustee with these legal docs and the information they need to fulfill these roles. Avoid a "TREASURE HUNT!"

## HOPE: Making Final Arrangements & Sharing What God Has Done for You

- Investigate end-of-this-life resources. Being proactive allows objectivity. Choose cremation or burial. Select your funeral home and cemetery. Make these final arrangements as a gift to your loved ones.
- Write a love letter to your spouse and letters of blessing to your children.
- Write out your personal testimony to honor God in your memorial service. Repeatedly, scripture calls us to remember what He has done and tell the next generation. Review your own timeline noting pivotal moments and key events. What has God done? Revelation 12:11 states the power of your testimony.
- Plan your own memorial service: select a theme, the music, scripture, even memorabilia that tells your story. Write final words for your memorial service.





### HEALTH: Adopting a Biblical View of Aging & Optimizing Your 4th Quarter

- Evaluate your attitude about the aging process. Have you deliberately adopted the biblical view of long life as God's gift? Or, have you slipped into ageism?
- Consider the impact of your health on those who will care for you. Plant-based nutrition, regular exercise, and a day of rest can make a tremendous difference per Dr. Eric. "It is never too late. Choice is more important than genetics."
- Planning ahead for your decline may preserve your independence. Research care strategies and living arrangements for a good old age. Identify upcoming issues so you can examine your options and optimize life, relationships, and ministry.
- An annual meeting with your support team is also highly recommended by Dr. Eric. He suggests you identify change indicators for renewed discussion and build support for your Medical Rep in team meetings.

### HEART: Engaging, Instructing & Building a Support Team

- Create a support team for your fourth quarter. By getting your affairs in order and sharing your plans, you will begin to unify those closest to you, facilitate team work, and enable them to support you.
- For many this will entail family members. For others, like Jesus, close friends will form their support team.
- Like Jesus, you set the agenda, and you lead the meetings. Topics to be discussed may include: Health—who is your Medical Representative? What are your health issues? What might be the best way to support your aging process? Assets—who is your Executor or Successor Trustee? Openness about assets and how they will be used tends to shut down speculation. Death—dying, final arrangements, and your faith can be openly discussed to dispel fear.
- Relationships—are best mended and strengthened before a crisis. Forgive, repent, and rebuild broken relationships within your power to do so. Pray and seek connection that will bless the younger and honor the older generations.
- Explore biblical examples of preparing those to whom you will pass the baton (Moses to Joshua, David to Solomon, Paul to Timothy, Jesus to the eleven). Model humility as did Jesus in John 13.

### HERITAGE: Building a Family Culture of Honor & Remembrance

- Per Stu Weber in our Heritage video, *Nurtured memories shape present character and determine future destinies*. Remembering and creating memorials for future generations is a biblical pattern of teaching.
- Tell your own story. Make remembering an important part of your family culture.
- Capture your larger family history by interviewing your oldest living relatives. They will be honored; only these dear ones can tell you their stories. As you listen, you may be surprised by wisdom and experiences you never suspected.
- To share your family history, experiment with scrapbooking, videography, recording, or writing a narrative. Invite other family members to join you.
- Begin genealogical research with a few simple charts.

