

Celebration of Life Planning and ‘Letter of Direction’

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From: UCSD Emeriti Association / UCSD Retirement Resource Center

To: Deans, Department Chairs, Division Heads, Program and Unit Directors, & appropriate Administrators

Re: We are announcing a resource webpage designed to provide guidance for (1) sending notice of an academic colleague’s passing, (2) planning for a campus “Celebration of Life” event, and (3) encouraging senior and active retired faculty to initiate steps recommended for end of life planning.

Given that UC San Diego is now in its fifty-sixth year as a general campus of the UC System, it should come as no surprise that its Emeriti Association (EA) now claims 550 members, more than half of them still active on campus, nor that many more will join after they elect retirement. And so it becomes the interest and concern of the EA that resources be made known to campus leaders in the event of the passing of a colleague.

The EA website, <http://emeriti.ucsd.edu> now provides helpful links to the following resources on Blink:

1. Link to ‘Campus Notices and Flyers’ for timely and efficient distribution of word that a colleague has passed.
<https://rmp.ucsd.edu/policy-records/notices.html>
2. Link to the University Communications and Public Affairs for proper noticing of local newspapers and other publications - <http://ucpa.ucsd.edu/about/contact/>
3. Link to Process for Submission of Faculty Memorials, to be posted on UC History Digital Archives website
4. Link to Faculty Club for planning a “Celebration of Life” event using the Club or just its catering function at any campus
http://facclub.ucsd.edu/mod_AboutUs/ContactUs.aspx
5. Link to instruction and outline for completing a “Letter of Direction” which might serve to encourage senior faculty and retirees to begin their end of life planning well in advance of the fact.
http://retire.ucsd.edu/pdf/ALL/LETTER_OF_DIRECTION.PDF

IMPORTANCE OF WRITING A 'LETTER OF DIRECTION'

Definition: Attorneys involved with end of life planning recommend completion of a "letter of direction" that serves two purposes: 1) it tells the location of important personal papers including access to online documentation, and 2) it expresses certain personal preferences. Such a letter does NOT have the same legal force as a trust or a will, an independent planning step, although ideally linked by selection of a trustee who will honor and fulfill provisions in the letter. A letter of direction should contain the following:

1. Notifications:

--Organ donation coordinator if specified. List all contact numbers for family members to be called, also doctors not already in attendance, religious advisors, personal attorney, designated trustees, financial advisors, insurance agent(s), academic department and designated colleagues, all friends wished to be notified.

--Also to be notified: UC Retirement Administration Service Center (RASC); cite UC employee number.

2. Personal Documents:

--Assemble in one place or else cite exact location of following personal documents: birth certificate, social security card, safe deposit box info/keys, marriage license, driver's license and vehicle registration, title to motor vehicles, property deeds, insurance policies (life, health, accident, auto), recent bank statement(s), check book(s), copies of trust and/or will, recent tax returns, investment account statements, pension information.

--Where applicable include: naturalization papers, military discharge papers, firearms registration, divorce papers, business ownership records.

--Consider when feasible a photocopied set of briefest documents to be sent to a responsible family member domiciled elsewhere.

3. Credit Cards:

--List all credit card accounts to be terminated upon death, include issuer, location, account number and **very important** don't omit user IDs and passwords for internet access to each account.

4. Personal Property Decisions:

--List items of personal property to be given to specific individuals, institutions, or charities (Might also be listed in trust or will)

5. Additional Instructions or steps to be taken personally:

--Health issues checklist

1. Faced with terminal disease diagnosis consider second opinion.
2. Ask for all treatment alternatives including palliative care.
3. Sign HIPAA authorization: who may know of your health status?
4. Complete advance directives; select health proxy
5. Execute legal DNR (do not resuscitate) order.
6. Execute legal DNH (do not hospitalize) order.

--Burial Instructions

1. Designate funeral home/mortuary
2. Embalmed? Buried? Cremated?
3. Burial Plot? Marker?
4. Memorial Service: Religious? Military?
5. A campus sited "Celebration of Life?"
5. Who will deliver the eulogy (the eulogies)?
6. Identify a desired charity for "in lieu of flowers."

6. Who Will Draft an Obituary?

--Who better than you? Get started. Review newspaper format then proceed according to your own style. Designate a respected colleague to update and edit the final version before public notice.

Postscript: Attorneys also reveal that their biggest problems assisting the family of a deceased client evolve from absence of a lucid and thorough letter of direction. Too many decisions are left to chance or to family squabbling after the fact. The message is clear; now is time to proceed.