

# Peaceful Planning: A Guide to Preparing for Loss

Helping you prepare for Peaceful Transitions for  
a life that has come full circle.

One Simple Step at a Time

By Julianne Miller | Life Money Management



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# INTRODUCTION

They call it the Circle of Life. When life ebbs and flows, and ultimately comes full circle. Letting go of someone you love at this stage is never easy.

Sometimes we have the chance to say goodbye and other times we may not. I want you to have a peaceful goodbye regardless of how the circle ends.

Included in this guide are some ways you can honor your loved one before and after their loss.

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## Before the Goodbye: Preparing in Advance

One of the most loving things we can do for those we care about — and for ourselves — is to prepare. When key details are in order, it allows more space for presence, peace, and connection when it matters most.

Here are a few meaningful steps:

1. **Gather important documents:** Locate their will, powers of attorney, and any other legal or medical documents. Ensure everything is current and properly signed.
2. **Confirm banking access:** Contact the bank or financial institution to confirm authorized access to essential accounts.
3. **Create moments that matter:** More than anything, carve out quiet time to be together. Say the words that are on your heart. Listen deeply. These are the memories that will carry you.

## IN THE FIRST 48 HOURS: WHAT TO DO RIGHT AWAY

The hours immediately following a loss can feel surreal — like the world has paused, even as certain tasks demand your attention. Be gentle with yourself. Grief and logistics are strange companions, but you're not alone.

Here are the urgent steps for the first 1–2 days:

1. Notify hospice, the funeral home, or the coroner, depending on the setting.
2. Consider organ donation if this is part of their wishes — a lasting legacy of generosity.
3. Reach out to trusted family and friends for support and presence.
4. Care for your body and soul: Allow yourself to cry, rest, drink water, and take breaks.

## IN THE DAYS THAT FOLLOW (DAYS 3–5)

Once the initial shock softens — even just a little — you may find a bit more space to reflect and move through the next steps. This time may bring unexpected laughter as you recall stories, tears as you write their obituary, and a deep desire to honor them well.

Here's what to focus on next:

1. Meet with the funeral home to finalize arrangements that align with their wishes.
2. Request multiple copies of the death certificate, as they'll be needed for many accounts.
3. Prepare the obituary — this can be a beautiful time to revisit photos and memories.
4. Keep a list of helpers and supporters so you can acknowledge their kindness later.

## GIVE YOURSELF GRACE

Grief doesn't follow a timeline or a to-do list. Healing is not linear. Some days will feel heavy; others may feel oddly normal. Both are okay. You don't have to navigate this alone.

Whether you're anticipating a loss or learning to find your footing afterward, A Well-Planned Goodbye is here to offer clarity, comfort, and connection during a time when life feels most overwhelming.

You've taken a brave step by seeking support. Let's take the next one together.

You are not alone — and a peaceful goodbye is possible.

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## A NOTE FROM JULIANNE

Hi, I'm Julianne — and I help families walk through this exact season. I know how heavy it can feel because I've been there, but I also know that simple steps now can ease so much pain later.

If you'd like help pulling everything together — from digital organization to final planning conversations — I'm here to support you.

We'll build a plan that gives you peace of mind, and gives your loved one the farewell they deserve.

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Making money easy — even when life isn't.



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