

A Compassionate Path: From Peaceful Planning to Life After Loss

*Guidance for Preparing, Remembering, and
Moving Forward with Grace*

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INTRODUCTION

Life is a beautiful circle, full of precious moments, heartfelt goodbyes, and hopeful new beginnings. While we can't fully prepare our hearts for loss, we can take steps to ease the stress that often accompanies these difficult times.

This workbook gently guides you from preparing for the inevitable, through those tender first days after loss, and into the weeks and months that follow. Take it one page, one step, and one breath at a time.

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Preparing for Goodbye — Before Loss

Part 1: Preparing for Goodbye — Before Loss



Why Planning Now Brings Peace Later

Planning ahead is a profound act of love. It ensures that when the time comes, your loved one's wishes are honored, and you can focus on what matters most — being present and cherishing your time together.



Section 1: Essential Documents and Accounts

- Review estate documents (Will, Trust, Power of Attorney, Advance Directive).
- Confirm beneficiary designations on life insurance, retirement accounts, and bank accounts.
- Gather copies of:
 - o Driver's license or state ID
 - o Veterans ID or benefits
 - o Social Security card



Section 2: Personal and Digital Assets

- Document important account passwords and digital assets.
- Create a secure location for logins and instructions for access.
- List personal items or heirlooms and any wishes regarding them.

Preparing for Goodbye — Before Loss



Section 3: Preparing the Home and Finances

- ☐ Ensure bills are current and automated where possible.
- ☐ Review home maintenance needs and safety concerns.
- ☐ Confirm access to financial accounts, or establish shared access where appropriate.



Section 4: Honoring Conversations & Emotional Preparation

- ☐ Have heartfelt conversations—say what matters most.
- ☐ Discuss preferences for end-of-life care and memorial services.
- ☐ Encourage reflection and legacy stories to preserve family history.



Reflection/Journaling Page: What Would Bring You and Your Loved One Peace?

(Write down a few thoughts or memories you'd like to share or preserve.)

The First Five Days After Loss



One Gentle Step at a Time

Whether the loss was expected or sudden, the first few days can feel overwhelming. Remember, you don't have to do everything at once. Focus on small, manageable steps.



Day 1–2: Immediate Actions

- Contact hospice, funeral home, or coroner.
- Consider organ donation.
- Notify close family and friends.
- Take care of immediate health and safety needs (yours and your loved one's home).



Day 3–5: Beginning to Notify and Organize

- Obtain multiple copies of the death certificate.
- Notify the employer and inquire about benefits.
- Contact Social Security and pension administrators.
- Begin reviewing household accounts and subscriptions.



Self-Care and Managing Overwhelm

- Drink water, eat nourishing meals, and rest when possible.
- Accept offers of help — people want to support you.
- Remember, grief has no timeline.

Note: When notifying organizations of a loved one's passing, you don't need to have all the answers. Use this simple script:
“Hello, I'm calling to notify you that my [relation], [Full Name], has passed away. I'd like to understand what steps are needed to close or manage their account. Could you guide me through this process?”

Reflection Page

What is a memory I cherish?

Helper Roles

Helper Roles: Who Can Support You?

- The Organizer – Helps with paperwork and arranging services.
- The Doer – Runs errands, makes phone calls, and manages tasks.
- The Listener – Provides a shoulder to cry on and a safe space for emotions.
- The Encourager – Plans small outings or brings lightness when you need it.

The Organizer – Calm in the Chaos

This person is detail-oriented and comfortable handling paperwork or coordinating logistics.

Ways They Can Help:

- Collect and sort important documents.
- Make checklists to help you stay organized.
- Schedule appointments or calls with professionals (attorneys, financial advisors).

The Doer – The One Who Jumps Into Action

They're ready to take things off your plate and keep things moving.

Ways They Can Help:

- Run errands like picking up groceries or dropping off paperwork.
- Make necessary phone calls to notify organizations.
- Help manage home tasks like coordinating cleaners or maintenance.

Helper Roles

Helper Roles: Who Can Support You?, continued

❤️ The Listener – Your Emotional Anchor

This is the person who doesn't shy away from hard conversations or emotions.

Ways They Can Help:

- Sit quietly with you when you need company.
- Listen without trying to “fix” anything.
- Be a safe space for venting or shedding tears.

🌻 The Encourager – Bringing Light and Hope

They help you rediscover moments of joy and remind you that life still holds good things ahead.

Ways They Can Help:

- Plan small, low-pressure outings like a walk or a coffee date.
- Bring over lighthearted entertainment (movies, funny books).
- Help you think about future plans when you're ready.

You may find one person naturally fills several of these roles, or that different people step in at different times. Keep this list handy, and don't hesitate to ask for what you need.

What Comes Next — The Weeks and Months After

You Don't Have to Do This All at Once

With time, you'll begin to move from immediate tasks to longer-term decisions. This next phase is about thoughtful closure and preserving your loved one's legacy.

Section 1: Securing the Home and Property

- ☐ Change locks if needed.
- ☐ Set light timers and adjust thermostat settings.
- ☐ Forward mail through USPS.
- ☐ Cancel unnecessary services (lawn care, cleaning, internet).

Section 2: Gathering Documents and Handling Accounts

- ☐ Locate important financial and legal documents.
- ☐ Close or transfer bank accounts and credit cards.
- ☐ Review insurance policies and file necessary claims.

Section 3: Notifications and Final Arrangements

- ☐ Notify organizations and clubs.
- ☐ Handle digital account closures (social media, subscriptions).
- ☐ Plan and carry out memorial or celebration of life gatherings.

Section 4: Settling the Estate and Honoring Legacy

- ☐ Review and execute the will or trust.
- ☐ Consult with an attorney or financial advisor if needed.
- ☐ Consider charitable donations or ways to honor their memory.

**REFLECTION/JOURNALING PAGE: A LEGACY
THEY LEFT BEHIND...**

(How did your loved one impact the lives around them? Write a few words in their honor.)



Moving Forward with Grace

🌱 When You're Ready: Small Steps Toward Your New Normal

Grief changes shape over time. When you feel ready, begin imagining what healing looks like for you. There's no need to rush. Take each day as it comes.



Resource Page

Throughout this process of grief and after loss work, there are resources you may find helpful. These are listed below:

[How to Settle An Estate](#)

[Social Security Administration](#)

[Veterans Administration](#)

[Grief Resources](#)

[Hospice and Community Care](#)

[Death planning and help](#)

[Finding an Elder Care Attorney](#)

[Responsibilities of an Estate Administrator](#)

A Letter to My Loved One

(Take a moment to write a final message or words of closure to your loved one. This can be private, shared, or simply a healing exercise for your heart.)

CLOSING WORDS

You have walked through some of life's hardest moments. Be gentle with yourself. Healing isn't about forgetting; it's about carrying their memory forward with grace and peace.

If you need further support, I am here to walk beside you.

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.

Julianne Miller, AFC®

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