Peace of Mind -- a thoughtful guide to help you prepare, protect those you love, and ensure that your wishes and values are known and honored at every stage of life.

MATTHEWS UNITED METHODIST

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A Gift of Preparation and Peace:
What This Booklet Offers

Greetings In the Name of Christ,

This booklet is offered as a ministry of care and encouragement, created to help you and your loved ones prepare for the future with clarity and peace of mind. As people of faith, we are called to be good stewards of all that God has entrusted to us—not only in the way we live, but also in the way we plan. May this resource be a gift to you and those you love.

Within these pages, you will find a simple guide to essential documents and decisions that can help protect your family, communicate your wishes, and ensure your legacy reflects your values. Whether you are just beginning to consider these matters or reviewing an existing plan, this booklet will walk you through key topics. This is not a legal document, but a conversation starter and a thoughtful tool to begin the process.

We encourage you to use this guide as a springboard for conversations with your family. Seek legal and financial counsel where needed, and make sure your plans are in place—not only for your peace of mind, but also as a blessing to those you love.

Let this work be an act of love, faith, and stewardship.

As you prayerfully consider this information, please feel free to reach out to your pastors if you have questions.

In Christ's Service,

David Christy

Pastor David Christy

October 1, 2025

Link to Print-Friendly Version

Getting Started

Each day is a gift, and as responsible adults, we must recognize that we are not guaranteed tomorrow, nor the health needed to manage our own affairs. While we may expect to look after ourselves and our loved ones, it is wise to prepare for the possibility that we cannot. The steps below will help you ensure peace of mind, regardless of what the future holds.

The first step is to prepare three essential documents. These will both provide for your loved ones and ensure that you receive the care you desire if you cannot communicate your wishes. Discuss your decisions with your family, your attorney and your financial advisor to ensure that your intentions are clear and legally supported.

1. Your Will. This document clearly communicates your wishes regarding the distribution of your estate after your death. It can provide for loved ones and causes that are important to you, and it names the Executor you trust to manage your estate. It is best to name an alternate Executor in case your primary choice is unable to serve. If you have minor children or other dependents, you should name a Guardian in your Will. If you wish to learn more about Wills that meet North Carolina statutory requirements, see the References section.

Because relationships and circumstances change, your Will should be updated accordingly. This can be done by adding a codicil - a simple supplement to your Will that updates your wishes without requiring a new Will. However, a codicil has the same execution requirements as your Will, described below.

Some assets do not pass through your Will but instead go directly to named beneficiaries. These include IRAs, 401(k)s and life insurance policies. Assets held jointly with rights of survivorship also pass automatically to the surviving owner.

If you die without a Will your Estate will be distributed under North Carolina's intestate succession laws. This could result in a distribution that does not reflect your wishes, and if you have minor children, a Guardian will be appointed by the court – someone you may not have chosen yourself. Under the Intestate Succession Act, the rules of distribution change depending on whether the person has been divorced and remarried. Having a Will avoids confusion, provides clarity and helps prevent family disputes. A link to North Carolina's intestate succession statute can be found in the References section.

Trusts and Powers of Attorney

If your Estate is large, contains a business, or involves dependents who require special care, you may need to establish a Trust. Trusts must be carefully coordinated with your Will, and the guidance of an experienced Trust attorney is essential to selecting the form best suited to your situation.

2. Durable Financial Power of Attorney (Financial POA). This document authorizes a trusted Agent to handle your financial affairs if you are traveling or incapacitated. It is wise to name an alternate Agent in case your primary choice cannot serve. Your agent may manage bill payments, income collections, tax filings and estate matters during your lifetime. This authority ends upon your death, at which point your Will takes effect. If you have established a Trust, it will be operational for as long as it has been specified in the Trust document. More information on a Durable Financial POA can be found using the links in the References section.

3. Living Will and Health Care Power of Attorney. In North Carolina these two documents may be combined into an Advance Directive for Natural Death. Your Health Care Power of Attorney designates a trusted individual (your Health Care Agent) to make medical decisions on your behalf if you cannot do so. This person will work with healthcare providers to ensure your wishes – regarding treatments, pain relief and hospitalization – are respected. Select someone who is both trustworthy and able to handle stressful medical situations. The Health Care Power of Attorney also protects the HC Agent from liability when they are following your wishes. Make sure that this person agrees to serve as your Agent. The Health Care Agent is often a different person than your Financial Agent.

Your Living Will communicates your preferences for end-of-life care, such as whether you wish to receive life-sustaining treatment in the event of terminal illness or injury. This document supports your family in making difficult decisions by reassuring them of your wishes. You can also specify how you want your remains to be handled in this document. Again, go to the links in the References section to learn more about these documents.

Execution of Documents

These documents must be signed in the presence of two disinterested adult witnesses and notarized. The Notary must witness all the signings. Once executed, inform your family or Executor of their location and provide copies to key healthcare providers and advisors. Avoid storing them in a safe deposit box, as access may require a court order.

Depending on the complexity of your Estate, you may prepare these documents yourself, but consulting an attorney is recommended – especially if you own property in multiple states, have complex family circumstances, or anticipate disputes. Your attorney can also include provisions for compensating your Executor or Agents if appropriate.

HIPPA Waiver – in addition to the documents above, you should execute a HIPPA waiver to allow medical providers to share information with designated family members. Unlike the Health Care Power of Attorney. this does not grant decision-making authority but ensures your loved ones can be kept informed.

Your Finish Line

One of the greatest gifts you can give your loved ones is clarity about your wishes for your earthly remains and your memorial. Advance planning can prevent tension and disagreement during a time of grief.

If you wish to be an organ or tissue donor, make your wishes known to your family and register with the appropriate authorities, such as HonorBridge.org, the federally designated organ procurement organization for 78 counties in NC.

You should also communicate your preferences regarding cremation or burial and make specific plans for whichever you choose.

Next, discuss if you prefer a Funeral Service, a Memorial Service or something else. The more specific you can prepare for this, the easier it will be for your family to finalize plans when they are already under a lot of stress.

In the United Methodist tradition, we often refer to the funeral as "A Service of Death and Resurrection." This name expresses the twofold nature of the church's ministry at the end of life: we gather to face honestly the facts of death and bereavement, and to celebrate and proclaim the good news of resurrection in Christ Jesus.

When a member of the church has died, it is important to notify the church office as soon as possible so that a Pastor can contact and arrange to visit the family. Matthews United Methodist Church (MUMC) can host funeral services in the Sanctuary, small Chapel or outside in the Memorial Garden & Columbarium. Although many families choose to have a time of visitation at the family home or the funeral home, MUMC is also able to accommodate visitations before or after the funeral service. The Pastor will assist the family and the funeral home in scheduling the funeral service and visitation.

Please call our Church Office at 704-847-6261 and if after hours, please follow the prompt for the Pastor on Call.

Church members may purchase a niche in the Memorial Garden & Columbarium. Double niches are $1,750; single niches are $1,000. Church members may wish to have a memorial plaque for eligible persons who are buried in other places or who have indicated their wish to have their ashes scattered in designated areas of the Memorial Garden. Memorials on the large plaque wall are $500. Contact the Facilities Office at 704-815-1914.

Your family does not have to go through the grieving process alone. MUMC offers GriefShare support groups throughout the year. Your loved ones can visit or join a group at any time. Learn more by contacting the church or visiting our Groups page on our church website, matthewsumc.org.

Leaving a Legacy

As part of your legacy, you may also indicate if you prefer flowers and whether gifts should be directed to causes you value. If you wish that memorial gifts be given to MUMC, please designate if you wish it to go to a specific ministry or to the General Fund.

Another way that you can ask to be remembered is through gifts to the MUMC Endowment. You can also leave a legacy at your church through your own gift to the Endowment. Just include your plan for giving in your Will or Trust. More information on the various funds in the Endowment are included at the end of this booklet. This information, including gift designation forms, can be found on the Endowment page on the MUMC website.

One Final Task

One last thing you can do to aid your loved ones, your Financial Advisor, your Attorney and your Agent/Executor is to develop lists of these items and make sure that copies are given to the appropriate persons:

- List of your primary medical providers, addresses, phone number and access to internet records (Usernames and Passwords).
- All significant financial or property assets and liabilities (home or business).
- All financial accounts (incl Insurance, Tax and Credit Cards) including Usernames and passwords/PINS. Name, address and phone number of business office that is responsible for each account.
- Location of Safe Deposit Box(es) or personal safes with combination information or location of key.
- All legal documents including deeds, mortgages, marriage license, divorce papers, passports, green cards, visas, etc.
- All internet accounts and Social Media accounts including Usernames and Passwords/PINS and how you prefer they be handled.
- Computer, tablet, phone and device (Smart Home devices) Usernames and Passwords/PINS.
- Special possessions for which you designate the recipient.
- Name, address, email address and phone number of any friends/people that you wish to be contacted when you die. If any of these people are a relative or friend, describe the connection if it is not obvious (i.e., a cousin of your mothers).

While it may take time and effort, completing this is a profound gift to those you love and those who may care for you in the future. A very detailed additional organizational tool, referred to as a NOKBox (Next of Kin Box) can be purchased in bookstores or on Amazon. Once finished, remember to keep these records up to date. You'll then be free to live fully, carrying the **peace of mind** that comes from having thoughtfully prepared for your loved ones.

The Matthews United Methodist Church Endowment Fund

Preserving a Legacy to Reach, Teach, Praise & Serve

The Matthews United Methodist Church (MUMC) Endowment Fund's objective is aimed at preserving our church community to reach, teach, praise, and serve others for future years. This fund enables the church's ministry to serve as a means of leaving a legacy for future generations. It is an opportunity to create a lasting impact that will benefit generations to come. Donors can choose from any of the following funds:

General Endowment Fund - To support the programs, ministry areas, and general operations of the church as determined by the Finance Committee.

Mission Fund - To support missions in and beyond the local church and community, consistent with the direction provided by the Global Impact Committee.

Capital Improvements & Renovation Fund - To support the major maintenance and improvements of church facilities as determined by the Trustees.

Kenneth Conley Fund - In his memory and to support the Capital Improvements and Renovation Fund category, which supports major maintenance and improvements of church facilities as determined by the Trustee Committee.

The Chuck and Karen Wilson Professional Development Fund - To provide support beyond the annual budget for educational and training opportunities for staff, clergy and congregants as determined by the Senior Pastor and the Staff Parish Relations Committee.

Ira and Anna Williams Scholarship Fund – Supports scholarships for students pursuing undergraduate degrees from accredited institutions in the field of early childhood, primary or secondary education or in the area of music or music education.

MatthewsUMC.org/Endowment

References

Information regarding Intestate Succession, Health Care Power of Attorney, Durable Power of Attorney and Living Will can be found in the North Carolina General Statutes at the links below. There are many variations possible with legal document depending on your unique situation. You are strongly encouraged to consult with your family, your attorney, financial advisor and family physician in order to ensure that these documents reflect your personal choices and situation.

Chapter 29 - Intestate Succession To access Chapter 29, enter this URL into your browser:
https://ncleg.gov/EnactedLegislation/Statutes/PDF/ByChapter/Chapter_29.pdf

Chapter 31 - Wills To access Chapter 31, enter this URL into your browser:
https://ncleg.gov/EnactedLegislation/Statutes/PDF/ByChapter/Chapter_31.pdf

Chapter 32A - Health Care Powers of Attorney To access Chapter 32A, enter this URL into your browser:
https://ncleg.gov/EnactedLegislation/Statutes/PDF/ByChapter/Chapter_32A.pdf

Chapter 32C - Uniform Power of Attorney Act To access Chapter 32C, enter this URL into your browser:
https://ncleg.gov/EnactedLegislation/Statutes/PDF/ByChapter/Chapter_32C.pdf

Chapter 90-321 - Right to Natural Death To access Chapter 90-321, enter this URL into your browser:
https://www.ncleg.gov/enactedlegislation/statutes/pdf/bysection/chapter_90/gs_90-321.pdf