

# How Disciples Can Prepare for Transition

Dorothy I. Riddle

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## Abstract

The esoteric literature provides us with ample information on death as a transition from one state of consciousness to another, or from one incarnation to another, as well as what needs to happen at the time of transition. However, there is very little attention given to the preparatory period for disciples—i.e., what is it that we are to do in the five to thirty years prior to transition. This article identifies the skills that we need to develop for the transition and describes the focus of two stages of work for disciples after the age of 65—the Transitional Phase and the Final Phase.

## Preparing to Die Well

Dying is a process with which we have a lot of experience: “Death, if we could but realize it, is one of our most practiced activities. We have died many times and shall die again and again. Death is essentially a matter of consciousness. We are conscious one moment on the physical plane, and a moment later we have withdrawn onto another plane and are actively conscious there.”<sup>1</sup> However, most of us do not remember this process from one life to another. In fact, if we view physical death as the ending of consciousness rather than as simply a transition to another state of consciousness, then our focus is usually on avoiding it as long as possible rather than on deliberately preparing for its occurrence in the fullness of time.

Many of the world’s religions, though, promulgate a belief in the continuity of consciousness, or rebirth. We are told by the Tibetan specifically that “death releases the individualized life into a less cramped and confined existence, and eventually—when the death process has been applied to all the three vehicles in the three worlds—into the life of universality.”<sup>2</sup> He goes on to say, “Can you picture the time when the process of death, clearly recognized and welcomed by the person, could be described in the

simple phrase, ‘The time has come when my Soul’s attractive force requires that I relinquish and restore my body to the place from whence it came’? Imagine the change in the human consciousness when death comes to be regarded as an act of simple and conscious relinquishing of form.”<sup>3</sup>

If we accept that we incarnate time after time in order to learn about being a unique individual on this physical plane while remaining part of the One Life, it is reasonable to assume that there is work that we can and should undertake as disciples prior to death in order to maximize the learning benefits to the One Soul of our life experiences. By analogy, if we know that we are moving to a new job or a new location, we typically take time to plan and prepare; we don’t simply drop everything and walk out the door leaving things in chaos behind us. So what comprises our spiritual planning and preparation process for the transition of death? And what precisely is it that we are preparing for?

What we are preparing for is the decision that the Soul takes as an expression of the Will-to-Be, operating under the Law of Attraction that oversees the process of physical incarnation and subsequent withdrawal or re-absorption back into the discarnate One Life. “The Soul will *know* that Its term of physical life is over and will prepare Itself to withdraw, in full consciousness, from the form. It will *know* that the

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## About the Author

Dorothy I. Riddle, Ph.D., serves on the Board of the School for Esoteric Studies and is a long-time esoteric student, speaking and writing particularly on feminist spirituality. She is the Project Director for the development of the Spiritual Evolution Assessment Scale (SEAS) and for the two portals: *Supporting Spiritual Development* (<http://www.servicegrowth.net/>) and *Values-Conscious Business* (<http://www.servicegrowth.org/>).

service of the form is no longer required and that it must be discarded. It will *know* that Its sense of awareness, being focused in the mind nature, is strong enough and vital enough to carry It through the process and the episode of abstraction.”<sup>4</sup> That decision by the Soul, we are told, is taken as a matter of free will, whether consciously or unconsciously.<sup>5</sup>

The timing of our death (assuming that it is not precipitated unnaturally) depends upon two factors:

1. The *physical shutdown of the body*, which ends when all systems cease to function and consists of an orderly series of physical changes under the Law of Attraction. “The Law of Attraction governs the process of dying, as it governs all else in manifestation. It is the principle of coherency that, under the balanced integration of the whole body, preserves it intact, stabilizes its rhythm and cyclic life processes, and relates its varied parts to each other. It is the major coordinating principle within all forms, for it is the primary expression (within the Soul) of the first aspect of divinity, the Will aspect...It is also the medium through which ‘restitution’ is brought about and by which the human soul is periodically reabsorbed into the overshadowing Soul.”<sup>6</sup>
2. The *release of the Soul* from physical plane attachment, which occurs when the Soul has completed Its work in this incarnation. “It is that individualized soul, in process of reabsorption, that institutes and orders, by an act of the spiritual will, that restitution... Thus the will aspect comes increasingly into play until, upon the Path of Discipleship, spiritual determination is brought to its highest point of development and, upon the Path of Initiation, the will begins to function consciously.

It is worth remembering, is it not, that it is in the deliberate issuing of the command by the Soul upon Its own plane to its shadow in the three worlds that the Soul learns to express the first and highest aspect of divinity, and this at first, and for a very long time, solely through the process of death.”<sup>7</sup>

Sometimes completion of both factors occurs simultaneously, and we are able to choose what appears to others to be a sudden death. Or we may appear to linger because either we are spiritually ready but the body has not yet completed its physical shut down, or the body is ready but we still have spiritual work to do.

### The Stages of Later Life

Kübler-Ross<sup>8</sup> was pivotal during 1960s in focusing attention in the West on the process of dying as experienced by the average person who is fearful of death. Her work on describing five stages from denial to acceptance

has been instrumental not only in changing public attitudes but also in developing new movements such as hospice, the teaching of palliative care in medical schools, and the launching of legislation on the right to die. Other authors since then have made similar contributions to public thinking about end-of-life issues, including Ram Das, Joan Halifax, Steve Levine, Sogyal Rinpoche, Ken Wilber, and a number of humanistic and transpersonal psychologists.

For those of us with an interest or belief in continuity of consciousness,

the introduction to the West of *The Tibetan Book of the Dead*<sup>9</sup> and its immense popularity in the 1960s provided important insights into the intermediate state between death and rebirth. As a result of this interest, over the years there has been a growing formal focus in the West on the process of conscious dying, including the train-

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ing of “transition guides,”<sup>10</sup> certificate programs in conscious living and dying,<sup>11</sup> a growing number of retreat centers for the spiritual preparation of those about to die, and the establishment of an International Association of Conscious Dying.<sup>12</sup> The Tibetan Buddhist tradition in particular (upon which the Bailey books and *The Secret Doctrine* are based) provides advanced meditative techniques on skills needed in conscious dying, such as the elimination of attachments and the absorption process.<sup>13</sup>

But much of the material on dying either focuses on the time period when we are acutely aware that death is imminent (e.g., after having received a diagnosis of terminal illness) or speaks in generalities of discipleship as “living in the presence of death.” Neither is helpful in preparing over the years in a systematic manner for being able to make that conscious, constructive, and timely choice to die at the optimal moment of the Soul’s choosing. Outside of monastic traditions, we have few guideposts for planning and managing the longer-term work that we need to do in the final third of our lives, preparatory to the release of the Soul.

The Hindu tradition is one of the very few that describes specific stages of later adult life from a spiritual perspective, and its last two stages of adult life cover the period from 50 years of age onward. *Vānaprastha*, the retirement stage (ages 50 to 74), involves a gradual detachment from the material world, including turning over duties to one’s children and spending more time in religious practices, in order to transition from material to spiritual life. *Sannyāsa*, the period after 74 years of age, marks a renouncing of all worldly attachments and focusing entirely on spiritual contemplation. While not all Hindus are expected to follow this sequence (especially women), the teachings do provide articulated support for a clear transition in focus from material to spiritual.

In the West, the work of Erikson on stages of psychosocial development stands out because it includes a stage called “late adulthood” that begins at the age of 65.<sup>14</sup> According to Erikson, the transition from middle adulthood to late adulthood shifts one’s focus to the psychosocial crisis of ego (meaning “personality”) integrity versus despair. The challenge in this final stage is

framed as gaining a sense of fulfillment about one’s life. There is, however, no clear link to spiritual work or to any anticipation of a shift in focus from material to spiritual.

It is striking in the West that much of the public attention on the latter part of life is focused in the material world. Retirement (typically at 65) is described in hedonistic terms as now giving the retiree time to play and travel. Any planning towards death is typically framed as estate planning regarding material assets. Elder care focuses on the special needs and requirements of a physical body that is aging and on combating physical isolation with socialization opportunities. Nowhere in this scenario is there any mention of support for inner spiritual work during these transitional years.

For purposes of discussion, let us assume that, after the age of 65, we have at least two more stages of spiritual development prior to death: the Transitional Stage and the Final Stage. Let us further assume that, as disciples, we typically remain engaged with personal family and friends, our communities, and the world for which we provide service, rather than retreating to an ashram or cave. How then might we conceptualize our spiritual work for these stages?

## The Focus of the Transitional Stage

If we think about our spiritual training and development as skill acquisition (e.g., alignment, meditation, personality integration, the building of the Antahkarana, etc.), we know that any skill requires more than intellectual awareness. It also requires practice (for skill consolidation) and application. You don’t just learn *about* it, or even learn *it*, and then move on if you wish that skill to be meaningful in your life. Why should it be any different in our spiritual life?

The Tibetan does give us some clues that we have specific work to do in our later years: “The reasons why disciples must at least endeavor not to relax unduly and should push on in spite of fatigue (the fatigue of years of living), in spite of the increasing ‘creaking’ of the human apparatus and the inevitable tendency [to rest on one’s laurels] that comes from constant service and con-

stant contact with others, might be enumerated as follows:

1. Disciples must endeavor to carry the rhythm of service and of fruitful living with them when—free of the physical body—they stand upon the other side of the veil. There must be no gap in that service.
2. Disciples must endeavor, as far as in them lies, to preserve the continuity of their consciousness as *working* disciples and should allow no gap to emerge between their present point of tension and that point of tension that supervenes after the death experience.
3. Disciples must endeavor to close the episode of this life experience so that it is apparent that they *are* members of an Ashram; they must permit no break in the established relationship, or any cessation to the flow of ashramic life through them to the human world. This activity, on account of the natural and normal deterioration of the physical vehicle as it grows older, is not so easy a task; it requires a definite concentration of effort, thus increasing the tension in which disciples ever live.”<sup>15</sup>

In addition, the Tibetan provides a little guidance as to the practices that might be helpful in preparation: “It might well be asked if it is possible to give a simple set of rules that could be followed now by all who seek to establish such a rhythm that life itself is not only organized and constructive but, when the moment for vacating the outer sheath arrives, there will be no problem nor difficulty. I will, therefore, give you four simple rules that link up with much that all students are now doing:

1. Learn to keep focused in the head through visualization and meditation and through the steady practice of concentration...

2. Learn to render heart service and not an emotional insistence on activity directed towards handling the affairs of others. This involves, prior to all such activity, the answering of two questions: Am I rendering this service to an individual as an individual, or am I rendering it as a member of a group to a group? Is my motive an Egoic impulse, or am I prompted by emotion, ambition to shine, and love of being loved or admired?...

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3. Learn, as you go to sleep, to withdraw the consciousness to the head. This should be practiced as a definite exercise as one falls to sleep. One should not permit oneself to drift off to sleep, but should endeavor to preserve the consciousness intact until there is a conscious passing out onto the astral plane...[and] facility in the work of abstraction is achieved.
4. Record and watch all phenomena connected with the withdrawing process, whether fol-

lowed in the meditation work or in going to sleep...

The carrying on of this practice and the following of these four rules over a period of years will do much to facilitate the technique of the death bed, for persons who have learned to handle their bodies as they fall asleep have an advantage over persons who never pay any attention to the process.”<sup>16</sup>

As we review the teachings that we have available to us, we can identify a number of skills that are relevant to the transition of death. Some of these—such as forgiveness—are foreshadowed in writings that we have about the process of dying. Others such as harmlessness—are esoteric concepts that have particular relevance in our preparatory activities: “*Harmlessness...is the scientific method, par excellence and esoterically speaking, of cleaning house and of puri-*

fyng the centers. Its practice clears the clogged channels and permits the entrance of the higher energies.”<sup>17</sup>

The Transitional Stage, lasting from around age 65 through at least age 80, can be defined as the time during which, having been relieved in large part from the necessity to earn a living, we are able to engage more deeply in spiritual study. This stage represents both increasingly active external service and a strengthening of the reflective spirit that characterizes an ongoing meditation practice. While our concrete mind continues to be active and focused, we may begin to exercise more discrimination in what we read or watch and in the persons with whom we spend time.

This is also the time when we need to do some stocktaking to determine what additional preparatory work may be necessary. Expectations of how we manage the transition and what we accomplish will naturally vary according to our own progress through the initiatory sequence; for example, expectations would be different for an Initiate completing the Fourth Initiation as compared with a disciple working on the Second Initiation. One of the main differences in expect-

tations stems from whether or not we as disciples have completed the Antahkarana and so could be expected to work actively with spiritual will energy. “The processes of abstraction are...set in motion by an act of the spiritual will...Destruction, death, and dissolution are, in reality, naught but life processes. Abstraction is indicative of process, progress, and development. It is this aspect of the Law of Life (or the Law of Synthesis as it is called in certain larger connotations) with which the Initiate specifically deals.”<sup>18</sup> Another difference in process between disciples and Initiates is that, as the moment of death draws near, disciples often have a mental conflict between “the will-to-serve and the determination to fulfill a particular aspect of the Plan, and the will-to-return in full force to the ashramic center. Where Initiates are concerned, there is no conflict, but simply a conscious and deliberate withdrawal.”<sup>19</sup>

Table 1 lists some of the key skills relevant to this transition process, many or all of which we will already be familiar with from our esoteric work in this life time. As part of our preparatory process, we may want to identify which skills we will need at our initiatory level (as indicated

**Table 1: Skills for the Transition Known as Death**

Relevant Skill	Initiatory Level		
	Second degree	Third degree	Fourth degree on
<i>Emotional control:</i>			
Detachment	✓	✓	✓
Forgiveness	✓	✓	✓
Harmlessness	✓	✓	✓
Banishing fear and worry	✓	✓	✓
<i>Mental discipline:</i>			
Alignment	✓	✓	✓
Concentration	✓	✓	✓
Contemplation	✓	✓	✓
Focusing in the head	✓	✓	✓
Holding steady in the light	✓	✓	✓
<i>Working with energy:</i>			
Control of the breath	✓	✓	✓
Holding/ resolving points of tension		✓	✓
Holding/resolving points of decision			✓
Working with energy threads			✓
Directed use of the spiritual will			✓

by a tick mark in that column in Table 1). For each of those skills, we will want to determine if we (a) understand the skill itself, (b) are competent in the skill, and (c) know when to use the skill in relation to the dying process. The Transitional Phase gives us time to address any deficiencies we may identify.

Along with this stocktaking, we need to reflect on the cycle of work in which we are involved. Is there more that we need to do? Is our portion of the work already completed? Is it time for us to shift into the position of advisor to a younger generation of disciples who will carry on the work?

### The Focus of the Final Stage

At some point in the five years before our actual time of death, we shift into the Final Stage. This stage can be particularly challenging both for disciples who continue to live in the midst of their families and neighborhoods (rather than in religious communities) and for those residing in some form of elder care.

From an esoteric perspective, we shift our focus from active study and service to an internal process of integrating all we have learned in our individual existences so that it can be used by the One Soul. We engage in an internal process of assessment and evaluation in order to determine our next steps in the cycle of rebirth after we have completed the transition. Much of this work goes on in the higher, abstract mind or on the buddhic plane and hence out of the awareness of our concrete mind. In fact, our responsibility is to remain focused in Soul awareness as much as possible in order to facilitate these processes, which may result in our appearing to others to be “doing nothing.”

Meanwhile, the earliest components of the shutting down of the physical body will have begun. Gradually we begin to lose the facility of various bodily functions. The one that becomes most apparent, and most distressing, is the loss of functioning in the concrete mind. One can think of it as the concrete mind having developed some “slippage” after years of work—some routine functions continue without disruption while others (like short term memory) become very

unreliable. Since the concrete mind is the overall manager of the physical body, we may become anxious and agitated as we notice these managerial abilities slipping.

The optimal scenario for us at this time of life is to have help in caring for our physical body so that the concrete mind does not become agitated, while also being allowed long periods of solitude for the internal work in which we are engaged. Unfortunately, loving families and social service agencies may worry that we are “withdrawing” and so make well-intentioned attempts at engaging us in socialization activities that distract us from our internal work. It is also possible that medical care providers, again with good intentions, may place us on medications that interfere with our ability to focus consciously at the Soul level.

Our responsibility during this stage is to prepare as thoroughly as possible for the dynamic of the Law of Attraction as it finally “brings about the imbalance that results in the act of disintegration, thus overcoming form—as far as the human being is concerned—and brings this about in three phases to which we have given the names:

1. *Restitution*, resulting in the dissolution of the body and the return of its elements, atoms, and cells to their originating source.
2. *Elimination*, involving the same basic process in relation to the forces that have constituted the astral body and the mental vehicle.
3. *Absorption* [or Integration], the mode whereby the human soul is integrated into its originating source, the overshadowing, universal Soul.”<sup>20</sup>

### Creating an Advance Directive for Our Final Transition

As trained disciples, we need to be responsive to the timing chosen by the Soul to make our actual transition. For those of us living outside of religious communities or retreats, this means that we will need the cooperation of those around us to allow us the freedom to transition in a timely manner. There are three things that we can do in anticipation of this event:

1. Make sure that all of our material affairs are in order so that the concrete mind has nothing about which to worry.
2. Say a preliminary goodbye to those close to us in anticipation of the final farewell, in order to help them let us go.
3. Outline specific requests (an Advance Directive) about how we wish to spend our final hours or days.

With regard to the third point, there are now a number of options for formally stating final wishes beyond the disposition of one's physical body and material assets<sup>21</sup> and even for legally registering Living Wills or Advance Directives so that they are immediately available when needed.<sup>22</sup> It is becoming more usual for the contents of an Advance Directive to include spiritually-related issues, rather than only the more common themes of palliative care. This trend provides us with an opportunity to think through and stipulate the type of support we wish to have at our final transition. Such an Advance Directive needs to address both the process of physical shut-down and the process of Soul detachment. Here are some issues to consider for inclusion in a document like *Five Wishes*:

1. *Facilitating Physical Shutdown*
  - a. Hydration: Do we wish to receive hydration if it means prolonging physical survival past the time when the Soul is prepared to detach?
  - b. Sustenance: At what point do we wish to stop food intake?
  - c. Medical assistance: Under what conditions do we want medication? Do we want pain alleviation if it means a lack of meditative clarity? Under what conditions should any life support be removed?
2. *Facilitating Soul Release*
  - a. Visual environment: Are there particular images or colors with which we want to be surrounded? Do we want to be looking at a particular view?
  - b. Auditory environment: Do we want silence? Do we want a particular form of

chanting? Do we want a particular type of music playing?

- c. Olfactory environment: Do we want incense burning? Do we want an odor-free environment?
- d. Sensory environment: Do we want to be touched or not? If touched, do we want physical touch or only a touching of the energy field?
- e. Energetic environment: Are there particular people who we do or don't want present with us? Are there particular people in our subjective spiritual community who we wish informed?

While we will have subjective ashramic support through this final transition, typically we are physically distant from other disciples at a similar stage of life. It is likely that we no longer travel to group meetings or conferences. We may find it difficult to read group letters or meditation materials. So it is critical that, during the Transitional Stage, we make specific provisions for how we wish to manage the Final Stage and do our best to inform both ourselves and others about the process in which we are likely to engage. That way those closest to us can help ensure that we have both physical support and time for internal integrative spiritual work.

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<sup>1</sup> Alice A. Bailey, *A Treatise on White Magic* (New York: Lucis Publishing, 1934), 494.

<sup>2</sup> Alice A. Bailey, *Esoteric Healing* (New York: Lucis Publishing, 1953), 433.

<sup>3</sup> *Ibid.*, 427.

<sup>4</sup> Bailey, *Esoteric Healing*, 318-319.

<sup>5</sup> *Ibid.*, 248.

<sup>6</sup> *Ibid.*, 433.

<sup>7</sup> *Ibid.*, 435.

<sup>8</sup> Elisabeth Kübler-Ross, *On Death and Dying* (New York: Simon & Schuster/Touchstone, 1969).

<sup>9</sup> W. Y. Evans-Wentz (ed.), *Tibetan Book of the Dead: Or, The After-Death Experiences on the Bardo Plane*, transl. Lama Kazi Dawa-Samdup (Oxford: Oxford University Press, 1960).

<sup>10</sup> See, for example, <http://www.transitionguide.org/>.

<sup>11</sup> See, for example, World University's certificate program in Thanatology: [http://www.worldu.net/thanatology/than\\_welcome.html/](http://www.worldu.net/thanatology/than_welcome.html/).

<sup>12</sup> See information at <http://www.worldu.net/iacd/statement.htm/>.

<sup>13</sup> See, for example, Dzogchen Ponlop Rinpoche, *Mind Beyond Death* (Ithaca, NY: Snow Lion Publications, 2007); Kyabje Kalu Rinpoche, *Luminous Mind: The Way of the Buddha* (Somerville, MA: Wisdom Publications, 1997).

<sup>14</sup> Erik Erikson, *Childhood and Society* (New York: W. W. Norton, 1950).

<sup>15</sup> Alice A. Bailey, *Discipleship in the New Age, Vol. II* (New York: Lucis Publishing, 1955), 502-503.

<sup>16</sup> Bailey, *A Treatise on White Magic*, 503-505.

<sup>17</sup> Bailey, *Esoteric Healing*, 40.

<sup>18</sup> *Ibid.*, 444-445.

<sup>19</sup> *Ibid.*, 464.

<sup>20</sup> *Ibid.*, 434.

<sup>21</sup> See, for example, Aging with Dignity's *Five Wishes* advance directive, which has legal status in a number of jurisdictions: <http://www.agingwithdignity.org/>.

<sup>22</sup> See the U.S. Living Will Registry information at <http://www.uslivingwillregistry.com/forms.shtm/>.