**End of Life**

**CHECKLIST**

***Why is doing necessary legal, financial, and personal planning important?***

1. FOR YOURSELF to have the peace of mind and the security of knowing there are people in your life who can take care of you if you’re not able to take care of yourself.
2. FOR OTHERS to have necessary information to make decisions about your health care, end of life preferences, how to handle your finances, and what to do with your possessions.

**There is a lot to be done to plan and prepare.**

**A reminder that the information below can be collected in steps and stages.**

**Legal and Financial Paperwork to Complete**

**Before Your Death**

Prepare an **Advance Directive** to appoint someone to make medical and lifesaving decisions for you if you weren’t able to do that for yourself.

Prepare your **Living Will** as part of your Advance Directive.

Complete a **Medical** **Power of Attorney** form to appoint a person, and possible backup person, to handle long-term medical decisions if you’re aren’t able to make them for yourself.

Give a signed/notarized copy of your Medical Power of Attorney and Advanced Directive/Living Will to your physician

Select a person to handle your finances in case of illness or death and complete a **Financial Power of Attorney** form.

Give a copy of your signed/notarized copy of Financial Power of Attorney to banks, investment companies, and other related financial institutions so your money and assets can be easily available without being tied up in the courts or other system.

Prepare a **Last Will and Testament** including list of how your possessions are to be distributed. Determine who will receive copies of that.

Keep password protected copies on your computer and decide if you want to have some hard copies in a file.

Make encrypted thumb drives of all these legal and financial documents. Give one to each of the people you are entrusting to handle these legal, health, and financial decisions for you with a way for them to keep your passwords safe.

**Provide Information to Others That They Would Need to Know**

**After Your Death**

Complete the **Key Information Worksheet**. It’s one document where you fill in all the essential information listed here:

* Personal Information: Date and place of birth, social security, email address, computer password, names and addresses of relative and family members, etc.
* Where are your end of life papers (Advance Directive/Living Will, Power of Attorney, Last Testament and other documents) located and who has copies

Job Information

* Education background
* Military History (if applicable)
* Automobile title or loan information
* Credit Cards and card statements
* Health Insurance policies and Long Term Care
* Life Insurance
* Retirement Income (pension, Social Security, investments, stock certificates, and IRA accounts)
* Bank Accounts: checking, savings and Certificates of Deposit numbers and passwords
* Investments
* Other Information: Real estate titles, outstanding loans or debt

**Other Information**

You may not know this information yet but it is something to think about and continue working on:

Funeral or Cremation Plans

A list of people to notify at the time of your passing

Location of passport, birth certificate, marriage certificate, divorce papers, etc.

Medical: a summary of your health history, medications, surgeries and procedures

Property owned, house mortgages, loan documents

A list of protected passwords or an App with logins and passwords for computer, phone, vendors, bill paying, bank accounts, social media, email, rewards programs, etc.

Talked with your family members who may or may not be your Power of Attorney or Executors for your estate and clarified your wishes for your death or in the event of long-term illness.

Other Information:

Other Information:

Other Information: