End-of-Life Planning Checklist

Documents to have available for your executor

Before your family can settle things with an estate lawyer, they will need access to the following information. Here is a checklist of documents you will need when planning for end-of-life.

- ☐ Last Will and Testament: Outline asset distribution and executor preferences.
- ☐ Revocable Living Trust: Transfer assets to a trustee for managed distribution.
- ☐ Beneficiary Designations: Keep updated for non-probate assets like life insurance and retirement accounts.
- ☐ Durable Financial Power of Attorney: Designate financial decision-maker if incapacitated.
- ☐ Durable Medical Power of Attorney: Designate a medical decision-maker if unable.
- ☐ Pet Trust: Create a trust for pet care after your death.

- ☐ Legal marriage certificate
- ☐ Social security card
- ☐ Medicare card
- ☐ Insurance information
- ☐ Current bills
- ☐ Driver's license
- ☐ Life Insurance Policy
- ☐ Employment benefits
- ☐ Summary of assets
- ☐ Real estate deeds
- ☐ Retirement plans
- ☐ Stocks and bonds
- ☐ Joint bank accounts
- ☐ Logins and Passwords to online accounts

Healthcare and End-of-Life Preferences:

- ☐ Living Will (Advance Directive): Specify end-of-life medical preferences.
- ☐ Life Insurance: Ensure financial support for loved ones.
- ☐ DNR and POLST Forms: Clarify emergency medical preferences.
- ☐ End-of-Life Housing Preferences: Outline care preferences for home or hospice.

Digital and Funeral Planning:

- ☐ Instructions for Digital Assets: Detail management of online accounts after death.
- ☐ Funeral and Burial Instructions: Specify wishes for services, cremation, or burial.
- ☐ Organ Donation: Register as an organ donor and communicate wishes.
- ☐ Family Communication: Share plans with loved ones for awareness.

Safe Online Resource:

- ☐ The U.S. Will Registry: (Free) Store location of registered wills and documents for later access.
- ☐ Self-Proving Affidavit (Free on The U.S. Will Registry)
- ☐ Sidedrawer.com (Free iCloud Storage): Secure digital copies and inform family of access location.