

End-of-Life Planning Checklist

Planning for the end of life can be a sensitive and challenging process, but it is an essential step in ensuring your wishes are honored and your loved ones are supported during a difficult time. This comprehensive checklist will guide you through the key aspects of end-of-life planning.

1. Personal Information

- Full Legal Name
- Social Security Number
- Date of Birth
- Place of Birth
- Current Address
- Marital Status
- Children's Names and Contact Information
- Emergency Contacts

2. Legal Documents

- **Will:** Ensure your will is up to date, clearly outlining the distribution of your assets.
- **Living Will:** Specify your medical treatment preferences if you are unable to communicate.
- **Power of Attorney:** Assign someone to make financial and legal decisions on your behalf.
- **Healthcare Proxy:** Designate a person to make healthcare decisions for you.
- **Trusts:** Set up any trusts needed to manage your estate and protect your assets.

3. Financial Information

- **Bank Accounts:** List all bank accounts, account numbers, and contact information for the banks.
- **Investment Accounts:** Include details of stocks, bonds, mutual funds, and other investments.
- **Retirement Accounts:** Document your 401(k), IRA, and other retirement plans.
- **Insurance Policies:** Provide information on life, health, home, and auto insurance policies.
- **Debts and Liabilities:** List any outstanding debts, including mortgages, loans, and credit card balances.

4. Medical Information

- **Primary Care Physician:** Name and contact information.
- **Specialists:** Contact information for any other doctors you regularly see.
- **Medications:** List of current medications and dosages.
- **Medical History:** Summary of significant medical conditions and treatments.
- **Health Insurance:** Policy details and contact information.

5. Funeral and Burial Wishes

- **Funeral Home:** Preferred funeral home and contact information.
- **Burial or Cremation:** Specify your preference and any related details.
- **Service Details:** Outline your wishes for the funeral or memorial service, including readings, music, and participants.
- **Obituary:** Provide information for your obituary, including significant life events, achievements, and preferred wording.
- **Cemetery Plot or Urn:** Details of any purchased plots or preferred urn.

6. Digital Accounts and Information

- **Email Accounts:** List email addresses and passwords.
- **Social Media Accounts:** Provide login information and instructions for handling these accounts.
- **Online Financial Accounts:** Login information for online banking, investments, and bill payments.
- **Other Online Accounts:** Any other digital subscriptions or memberships.

7. Personal Wishes

- **Messages to Loved Ones:** Write any letters or messages you wish to leave for family and friends.
- **Charitable Donations:** List any charitable contributions you would like to be made in your name.
- **Personal Property:** Specify any sentimental items and their intended recipients.

8. Review and Update Regularly

- Review and update your end-of-life plan regularly, especially after major life events such as marriages, births, divorces, or deaths in the family.

Having a clear and comprehensive end-of-life plan can provide peace of mind for both you and your loved ones, ensuring that your wishes are respected, and your affairs are in order.