

End of Life Planning Checklist

*Entrusted individual(s) should be given information on where to locate the following:

Estate Planning Documents

- Will / Trust
- Power of Attorney / Medical Power of Attorney
- Medical Directive / Do Not Resuscitate
- Funeral Planning

Documents

- Birth Certificate / Immigration Documents / Social Security Number & Card / Driver's License / Military Identification / Service Records
- Marriage / Divorce Papers
- Love Letters / Bequests

Finances

- Sources of Income (include tax returns)
- Bank / Retirement / Investments / Brokerage Accounts (PIN numbers and passcodes)
- Stocks and Bonds Certificates
- Life Insurance Policies
- Credit Card Accounts (PIN numbers and passcodes)
- Liabilities (debt, loans, mortgages)
- Insurance (home, auto, boat, etc.)

Personal Property

- Home(s), Land & Auto (deeds, titles, loan details, warranties)
- Home & Land Improvement Documentation (include receipts)
- Utilities & Maintenance Information

Medical

- Insurance Cards, Coverage, List of Healthcare Providers
- Personal Medication / Dosage / Instructions

Professional Contacts (Name, Address, Phone, Email)

- Financial Advisor
- Accountant
- Attorney & Estate Lawyer
- Insurance Agent
- Executor
- Beneficiaries of Estate
- Family, Friends, Colleagues

Miscellaneous

- Safety Deposit Box / Home Safe (include location and passcodes)
- Memberships, Subscriptions (note those with automatic payments)
- Computer / Email / Social Media / Online Services (login information, security questions)
- Pets (medication, diet, etc.)