

End of Life Planning Checklist

1. PLAN FOR ESTATE AND FINANCES

- Will or Trust
- Power of Attorney for Finances
- Executor(s) Designation

2. PLAN FOR FUTURE HEALTH CARE

- Advance Care Directive / Living Will
- Power of Attorney for Health Care
- List of all current medications
- Health insurance information with policy and phone numbers
- Long term care insurance information with policy and phone numbers

3. FUNERAL PLANS

- Cremation or burial plans
- Celebration of life service plans

4. COLLECT IMPORTANT PAPERS, LEGAL DOCUMENTS & OTHER INFORMATION

- List of all assets and related documents
- List of all liabilities and related documents
- List of all sources of income
- Names and account numbers of bank accounts / financial institutions / life insurance policy
- Names and account numbers for investment income accounts/brokers or financial institutions
- Copy of most recent tax return
- Names and contact info of friends to share with close family

5. COMMUNICATION WITH DESIGNATED EXECUTOR(S) AND FAMILY

- Review financial and health care plans
- Review locations of all documents and contact information
- Record usernames and passwords to accounts
- Explain your decisions and desires
- "What matters to me at the end of life is..."

6. REGULARLY REVIEW PLANS AND UPDATE



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Funeral Planning

[Interra Green Burial by Mueller Memorial](#)

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[Bradshaw Funeral & Cremation](#)

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[Mueller Memorial Funeral and Cremation](#)

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Senior Living

[St. Andrew's Village](#) • preshomes.org

Home & Hospice Care

[Beyond Hospice & The Pillars Hospice Home](#)

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