

End-of-Life Planning Checklist

End-of-Life Care

- Preferred Care
 - Home health care
 - Nursing home
 - Assisted living facility
 - Palliative care
 - Continuing care retirement facility
- How will you pay for this care?
- Create an advanced directive

Contact Information For:

- Attorney
- Estate Planner
- Accountant
- Veterinarian for pets
- Primary care doctor

Burial Preferences

- Viewing
- Memorial service or funeral
- Cremated or buried
- Eulogy, music, speeches
- Who should be notified or invited

Burial Arrangements

- Headstone or marker info
- Burial plot details (if purchased)
- Preferred burial plot (if not purchased)
- Pallbearers
- Obituary
- Who should be notified or invited

List of Assets & Liabilities

- Real estate
- Bank accounts
- Investment accounts
- Annuities
- Retirement accounts
- Life insurance policy
- Loans
- Mortgage(s)
- Credit cards
- Loans owed to you

Legacy/Memorial Items

- Inspiring stories & experiences
- Wishes for death anniversary

Documents

- Power of attorney - finances
- Power of attorney - health care
- Medicare card
- Will and/or trust
- Funeral documents
- Financial records
- Financial account documents
- Car title(s)
- Social Security card
- Personal records
- Last wishes
- Organ or tissue donor designation
- Password list
- List of bills + due dates

Miscellaneous

- Instructions & information for any pets
- Digital assets:
 - Email accounts
 - Photos
 - Files & online documents