

## End of Life Planning Checklist

- Original Copy of Living Will
- Original Copy of Medical Surrogacy appointment
- Original Copy of Durable Power of Attorney
- Copy of Existing Will (name and phone number of attorney who drafted)
- Copy of any revocable or irrevocable trust documents
- Copies of any funeral insurance policies or pre-need arrangements that have been made. If this is not addressed in your will you may want to include a letter or statement describing your last wishes – i.e do you want to be cremated etc. - this will save your loved ones from guessing what you wanted.
- Copies of any in-force life insurance policies
- Copies of most recent bank statements showing bank contact information and account number for all checking and savings accounts and any CD's
- Copies of most recent brokerage statements showing broker name and contact information as well as account number
- Contact information for the appointed executor, personal representative and all listed beneficiaries
- Other helpful information for loved ones handling your medical situation would be the names and numbers of your primary care physician, and any specialists your are currently under the care of as well as a list of all prescription medications you are currently taking, a copy of your Medicare, Medicaid or other health insurance cards.
- Once you have this information together, we can help you organize it and keep an electronic back up copy if you wish. We also suggest that you hold a "family fire drill" once you have this complete. Tell your spouse or child to pretend that the worst has happened and to go through the list of what they would do. This helps to make sure you have included all the information they may need, or to inform them of where they will find that information.