

# End-of-Life-Planning Checklist

Life can be filled with uncertainties, but one thing is always true: someday, it will come to an end. Whether that end is imminent or on a distant horizon, taking the time to plan for what comes after is a gift to your loved ones.

By spending a bit of time getting your affairs in order now, you protect those you love from confusion, uncertainty, and frustration after you've passed. You also give yourself peace of mind knowing that these details are taken care of.

Getting organized can feel like an overwhelming task. To make the process simpler, we've assembled this checklist to help guide you in assembling your vital documents and thinking through the steps of end-of-life planning.

## 10 Steps to Planning Your Affairs

Getting your affairs in order may be daunting, but you don't have to tackle it all at once. Breaking the process up into smaller steps can help you work through it one piece at a time.

- Gather important documents and essential paperwork.
- Speak with an estate attorney to create a last will and testament.
- Ask your attorney about setting up a living trust.
- Complete a living will or advance directive detailing your medical wishes.
- Obtain a durable power of attorney.
- Check and update your beneficiaries on all life insurance, retirement accounts, pensions, pay-on-death accounts, and so forth.
- Plan for your digital afterlife for your social media and online accounts.
- Preplan your funeral arrangements and secure payment with the funeral home.
- Make and store copies of your important documents and instructions.
- Talk to your loved ones to let them know about your wishes and their responsibilities.

Know that you are not alone through this process. Your estate attorney can help you with assembling many of these pieces. Your funeral director can also help you through the prearrangement process and answer your questions.

# End-of-Life-Planning Checklist

## Building an “In Case of Death” Binder

You may wish to assemble copies of vital documents and paperwork into a binder or folder so that everything is in one place. Once you’ve put the pieces together, the finished binder can be stored in a secure place like a home safe. Just leave instructions with a trusted family member or friend for accessing the binder.

### Important documents to store in the death binder include:

- Will and living trust
- Power of attorney
- Life insurance policy details
- Birth certificate
- Marriage license
- Banking and credit card account information
- Car titles and property deeds
- Passwords and account information for your digital accounts
- Funeral wishes and preplanning details

You may also wish to include spare keys for vehicles, safe deposit boxes, and anything else a loved one will need access to after you’re gone. Be sure to label any keys and make note of where important items and documents can be found if they are not stored in the binder.