

End-of-Life Planning Checklist

Funeral Arrangements & Preferences

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| ☐ Burial or cremation | ☐ Headstone or marker info |
| ☐ Type of service you prefer
(traditional funeral, celebration of
life, memorial service, etc.) | ☐ Burial plot details or preferred
burial plot |
| ☐ Preferred charities for donations | ☐ Pallbearers |
| ☐ Obituary outline | ☐ Who should be notified or invited |
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Estate Plan

Last Will and Testament

- ☐ Guardian for minor children and/or pets
- ☐ List of all property and determine who you want to receive each asset
- ☐ Executor to carry out the terms of your will

Beneficiary Designations: Name a beneficiary for all non-probate assets, including:

- ☐ 401 (k) and IRA accounts
- ☐ Life insurance policies
- ☐ Pensions

Durable Financial Power of Attorney

- ☐ Financial agent to make decisions on your behalf
- ☐ Determine what financial decisions you want your agent to be responsible for

Advance Care Plan

Durable Medical Power of Attorney

- ☐ Healthcare agent to make important medical decisions on your behalf
- ☐ Determine what medical decisions you want your agent to be responsible for

Living Will

- ☐ Outline medical care preferences for doctors and your healthcare agent to follow
- ☐ Share this with your healthcare agent so they understand your wishes

Insurance

- ☐ Take into consideration your age, expenses, and number of dependents to choose a plan with the right amount of coverage to protect your loved ones
- ☐ Revisit your plan annually to determine if your needs have changed

DNR & POLST Forms: Often used by those with failing health or an existing diagnosis

- ☐ If preferred, ask your doctor to put together a DNR (do not resuscitate) Order
- ☐ A Physician Orders for Life Sustaining Treatment (POLST) form is a medical order from your healthcare provider to give you more control over your own care. If preferred, ask your doctor to outline your wishes for end-of-life care in a POLST form.

Other Important Documents

End-of-life Housing Arrangements

- ☐ You'll want to consider where you'll want to live in your final days. You may want to take into consideration cost, convenience and comfortability, in addition to other factors important to you.
- ☐ Be sure to share these preferences with your loved ones.