



## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST



Hello, my name is Donna Marie, Whole Life Death Doula, owner, and founder of Best Life of Wellbeing. Our checklist is to get you thinking about your current life, your end of life and the documents and other things you will need to consider. We encourage you to be as creative as you desire with this process and I'm here to help you with each step as you begin to think of your unique legacy and end of life plan.

**First is a review of a few terms.**

**Advanced Directive and Living Will:** Advance Care Planning involves thinking about what matters most to you, making decisions about what kind of medical care and treatments you would or would not want if you were at the end of life, and choosing a person who can understand these decisions and speak for you if you are unable.



Most importantly, advance care planning involves having conversations about these issues and clearly communicating your choices with your family, loved ones and your doctor. One day you're going to die and planning for the end gives your peace of mind and will help you family or loved ones greatly.

**Whole Life and Legacy Planning:** As you are planning your end of life, please take a moment to meditate, pray, or spend time in nature to really thinking about how you want to be remembered. We know we are dying every day and getting closer to death but ask yourself are you living the way you want to be remembered. Does your thinking, your walk and your talk align? Are you living the legacy you want to leave?

We will discuss your **Estate Plan, Funeral and Body Disposal Plan**, to determine what you would want to happen to your assets, your body, and the type of funeral you would want to include what you would want said about your life.

Plan your 1:1 coaching session [HERE](#) and let's get started today.

At Best Life of Wellbeing, our Whole Life Coaching program is guided by our Six Pillars of Wellbeing:

1. Legacy; 2. Engagement; 3. Growth; 4. Abundance; 5. Creativity; 6. YOU. ([L.E.G.A.C.Y.](#)) We begin with the end in mind by focusing on YOU. We discuss your values, and beliefs to get you aligned with your intentions and your energetic frequency to ensure you're intentional about your Legacy and end-of-life plan and intentional in living your Legacy in everyday life.

We don't like to talk about it but a change in health or an accident can happen to any of us. That is why it's important for all of us, regardless of our age or health, to communicate our end of life wishes and the kind of care we would want if we ever became too sick to speak for ourselves or care for ourselves. No one wants to be in the difficult position of having to guess what kind of treatment a loved one would want or not want. It's important to have your wishes honored and to empower the person you designate to support your choice when you need it most.

Whether you're sharing your own wishes or learning about someone else's, we hope this starter guide will give you a lot to think about and help to get the thinking and conversation started.

Please contact us at [Best Life Wellbeing](#) for a more personalized discussion regarding your end-of-life planning, legacy planning and/or Whole Life Coaching services.



## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST

### End of Life Documents and Legacy Documents

Name	Location
Living Will	
Health Proxy	
Durable Power of Attorney	
Financial Power of Attorney	

### General Documents

**Keep these organized and make sure loved ones know where they are located**

Name	Location
Birth Certificate	
Driver's License	
Marriage License/Domestic Partnership/Civil Union Certificate	
Passport	
Citizenship Papers	
Prenuptial Agreement	
Safe and Combination	
Safe Deposit Box, Keys, Authorization	
Separation/Divorce Papers	
Social Security Card	



## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST

<b>Insurance</b>	
<b>Name</b>	<b>Location</b>
Life Insurance	
Health Insurance	
Mortgage Insurance	
Travel Insurance	
Property & Casualty	
VA Insurance	
Long Term Care Insurance	
Beneficiary forms for insurance & annuity policies	
<b>Financial &amp; Investment Documents</b>	
<b>Name</b>	<b>Location</b>
Beneficiary Forms (401k, IRA, Pension)	
College Savings Plan Statements	
Mutual Fund Account Statements	
Stock Certificates (not held in an account)	
Online Securities transaction information	
Investment Club Documents/Records	
Bearer Bonds	
Retirement Plan Statements	
Social Security Statements	
Other company benefits (deferred compensation)	



## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST

### Digital Presence

Account	Username	Password	Pin
Bank			
Email			
LinkedIn			
Clubhouse			
Facebook			
Instagram			
Twitter			
Spotify			
Webpage			
Zoom			
Apple			
Google			
Snapchat			
Twitch			
YouTube			
Investment/Retirement Accounts			

LIVE YOUR BEST LIFE  
BY EMBRACING YOUR WHOLE LIFE



**BEST LIFE OF WELLBEING  
END OF LIFE DOCUMENTS CHECKLIST**

**Documents Needed Soon After Death**

Death Certificate	
Burial Instructions and documents	
Information for obituaries	
Last Will and Testament	
Cemetery Plot Deed	
Funeral Home Preference and Information	
Military Discharge Papers	
Charitable Donation Preference(s)	
Phone Numbers/Address of County Probate/Surrogate Court	
Letter of Instruction from deceased to his/her executor	



**LIVE YOUR BEST LIFE**  
BY EMBRACING YOUR WHOLE LIFE





## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST

### Who To Call

Life Insurance	Name	Number	Email
Lawyer			
Executor			
Bank			
Accountant/Tax Professional			
Estate Planner			
Funeral Home			
ID Theft Protection			
Auto Insurance			
Homeowner's Insurance			
Umbrella Liability Insurance			
Health Insurance			
Long-Term Disability Insurance			
Rental Property Manager/Real Estate			
Doctor			
Dentist			
Veterinarian			
Family			
Investment/Retirement Accounts			

LIVE YOUR BEST LIFE  
BY EMBRACING YOUR WHOLE LIFE



## BEST LIFE OF WELLBEING END OF LIFE DOCUMENTS CHECKLIST

### Instructions for Remains

Open Casket	
Closed Casket	
Cremation	
Type of Burial	
Obituary/Eulogy	
Other (Specify)	
Casket/Urn Name	
Model Number	
Burial Clothes	

### Burial Location

Name	
Phone	
Address	

### Funeral Home

Name	
Phone	
Address	

### Presiding Minister/Officiant/Celebrant

Name	
Phone	
Address	

### Musical Selections

Song	
Performer	

### Other Speakers/Roles

Name	
Phone	

### Scripture Reading


LIVE YOUR BEST LIFE  
BY EMBRACING YOUR WHOLE LIFE

