

# **BE Ready:**

## **Checklist for End-of-Life Planning**

Life is fleeting and comes with no guarantees, but if you plan ahead you can spare your loved ones a great deal of stress and ensure that your deepest wishes are carried out. Use this checklist to get your records and papers in order. Then store everything in a safe place that your family members know about and can access. **Karen Wyatt MD: [www.karenwyattmd.com](http://www.karenwyattmd.com)**

1. \_\_\_\_ **Will:** Make sure it is updated regularly and reflects your wishes.
2. \_\_\_\_ **Trust Documents** for any family or charitable trust you have established
3. \_\_\_\_ **Bank Accounts:** List all accounts with numbers, beneficiaries
4. \_\_\_\_ **Credit Cards:** List all cards and account numbers along with cancellation info
5. \_\_\_\_ **Safe Deposit Box(es)**
6. \_\_\_\_ **Social Security Number**
7. \_\_\_\_ **Birth Certificate**
8. \_\_\_\_ **Marriage Certificate** (If applicable)
9. \_\_\_\_ **Veteran's Discharge Papers** (If applicable)
10. \_\_\_\_ **Death Certificate for Deceased Spouse** (if applicable)
11. \_\_\_\_ **List of Professional Advisors:** attorneys, doctors, accountants, agents, or other representatives; include contact information
12. \_\_\_\_ **Insurance Policies:** Record policy numbers and contact info for ALL policies
13. \_\_\_\_ **Business Agreements and Contracts**
14. \_\_\_\_ **Copyright Information** for creative and intellectual property
15. \_\_\_\_ **Real Estate Deeds**
16. \_\_\_\_ **Mortgages**
17. \_\_\_\_ **Stock Holdings Certificates**
18. \_\_\_\_ **Brokerage Accounts:** account numbers, broker's name and contact information
19. \_\_\_\_ **Savings Bonds**
20. \_\_\_\_ **Automobile Title(s)**

21. \_\_\_\_ **Cemetery Lot and Marker** (If pre-purchased)
22. \_\_\_\_ **Funeral Preferences** (If applicable)
23. \_\_\_\_ **Advanced Directive** or Living Will: specify your wishes for care at the end-of-life
24. \_\_\_\_ **Durable Power of Attorney**: signed form appointing a person to manage your finances/estate
25. \_\_\_\_ **Medical Durable Power of Attorney** (or Health Care Proxy): signed forms appointing the person who will speak for you regarding medical issues if you cannot speak for yourself
26. \_\_\_\_ **Internet Information**: Websites, email, social media, or ecommerce accounts with user names and passwords and instructions for managing those accounts
27. \_\_\_\_ **Auto-Pay Accounts**: List any accounts or products that are automatically billed to you or deducted from your bank account each month