Death Planning Checklist

Facing the challenges will be easier if preplanned. Think about preplanning for yourself and recommend it for others.

1) Personal Details & Family Information

- Have you recorded your full name, date of birth, current address, and social security information?
- Did you indicate any prior names from prior marriages?
- Did you provide the name and details of any former spouse, either divorced or deceased?
- Have you provided a list of close family members or personal friends – with telephone numbers, email addresses, and mailing addresses

2) Healthcare Proxy, Living Will and Power of Attorney

- Does your lawyer and executor have copies of all three documents?
- What are the contact details for both the lawyer and executor? Phone number? Email? Address?
- Have you consulted with your financial institution on the best way to ensure access to your accounts at your death?

3) Insurance

- Have you recorded the name of the insurance company, contact information and policy numbers for all relevant insurance? This includes life insurance; home/renters insurance and liability insurance; auto/motorcycle/RV and boat insurance; and health insurance.
- Are the beneficiaries of any life insurance policies current?

4) Wills, Trust, & Estate Plans

- Do you have these documents completed, if applicable?
- Have you recorded the name, address and contact number of the estate lawyer and law firm, as well as the executor?
- Have you given a copy of these documents to the executor?

5) Dependents

- If you are responsible for minor children; children – minor or adult – with special needs; or parents/elderly relatives, have you recorded all relevant information for their continued care?
- Have you discussed their continued care with a family member or friend? Have you provided this information to the lawyer and/or executor?
- Have you made arrangements for the care of your pets – either house pets or larger animals, such as horses? Have you provided this information to the lawyer and/or executor?

6) Special Collections & Donations

- Have you created an inventory of your collection(s)?
- Have you taken photographs of the items in the collection(s)?
- Has any collection with monetary value been appraised?
- If a collection is intended for a specific individual or to be donated to an organization, have you specified this in your will?
- If a collection is to be sold and the proceeds added to the assets of your estate, have you provided the name and contact details of any person(s) or organization interested in purchasing them?
- Have you provided copies of all of this information to your lawyer and executor?
- Does your will properly reflect your desires, as well as the recipient(s) of any of the collections?