



END OF LIFE PLANNING*

Verify Location of Important Items

- | | |
|-----------------------------------------------------------|--------------------------------------------------|
| <input type="checkbox"/> Original Last Will and Testament | <input type="checkbox"/> Medical Insurance Cards |
| <input type="checkbox"/> Trust Agreement(s) | <input type="checkbox"/> Life Insurance Policies |
| <input type="checkbox"/> Power of Attorney | <input type="checkbox"/> Funeral Arrangements |
| <input type="checkbox"/> Health Care Advanced Directives | <input type="checkbox"/> Automobile Title(s) |

Review

- Does your Trust Agreement(s) and/or Last Will and Testament reflect your current wishes for distribution of property?
- Who is nominated as personal representative(s)/executor(s)/trustee(s)?
- Have you given the proper individual(s) the power to manage your finances?
- Have you designated someone to make health care decisions should you be unable to?
- Are your preferences regarding artificial life prolonging procedures stated in a legally binding document, i.e., a Living Will? Are your loved ones aware of your preferences?
- Have you arranged for a funeral or disposition of bodily remains? Does your family know about these arrangements or know who to contact?
- Do your family members or helpers know where your important documents are stored? Do they know the name of your estate planning attorney?

Other Concerns

- **Beneficiary Designations** – Have you designated the proper beneficiary on financial accounts? Should you designate a beneficiary at all? With few exceptions, beneficiary designations take precedence over your Last Will and Testament or Trust Agreement.
- **Title to Assets** – Are assets titled correctly? Does anyone need to be added to a house, automobile, or bank account? Do assets need to be titled in the name of your trust?
- **Minor Children** – Have you designated a guardian for your minor children?
- **Pets** – Have you provided for their care should something happen to you?
- **Digital Assets** – Can someone access your digital assets, i.e., email, online accounts?
- **Notifications** – Are there specific individuals that need to be notified of your passing? Family members? Business associates? Friends?
- **Foreign Assets** – Do you own assets or real property out of state? Out of country? Transfer of these assets on death can be burdensome – have you consulted with an attorney to facilitate an efficient transfer following death?
- **Cash on Hand** – Do your personal representative(s)/executor(s)/trustees(s) or other helpers have access to funds to ensure your wishes are carried out? Remember that Powers of Attorney are no longer effective following death.

**** End of life planning is never the same from one individual to the next. This guide is not intended to be a complete list of all concerns you may have. Please call to develop a plan that works for YOU.***