

End-of-Life Planning Checklist



- ☐ **Complete an End-of-Life Values Worksheet**
 - Reflect on what matters most to you
 - Clarify your perspective and beliefs about living and dying
- ☐ **Complete Advance Directive**
 - Review, complete and notarize a Durable Power of Attorney for Health Care
 - Review, complete and notarize a Health Care Directive/ Living Will
 - Consider need for POLST, DNR, Dementia Directive
- ☐ **Share Document Copies**
 - Provide document copies to your Health Care Agent(s), Health Care team, and close family
 - Ask your Medical Providers to add a copy to your electronic files
- ☐ **Have Conversations**
 - Share and talk about your wishes with your Health Care Agent(s) and Loved Ones
 - Discuss your choices with your Health Care team and ensure they will support them
- ☐ **Create an Estate Plan**
 - Review, complete and notarize a Durable Power of Attorney for Finances
 - Create a comprehensive list of all your assets
 - Create a Will and name an Executor or establish a Revocable Living Trust with a Successor
 - Consider hiring a lawyer for advice and to create or review documents
- ☐ **Organize all your Key Information and Documents in one Secure Place**
 - Personal information and important documents
 - Financial information
 - Dependent and pet care
 - Inventory of physical possessions
 - Log-in information for electronics and online accounts
 - Instructions about home, vehicles, yard, equipment etc.
- ☐ **Consider Final Arrangements**
 - Decide what you would like to happen to your body when you die
 - Consider what type of Ceremony and Rituals you would like to honor your life
 - Choose a Funeral Home that can help your Loved Ones fulfill your wishes after you die
 - Complete forms for Designated Agent for Disposition, Disposition Authorization, Vital Statistics Form, Instructions and Wishes to Honor Your Life
 - Consider funding for final arrangements
- ☐ **Consider Decluttering your Life**
 - Clean out attic and storage units, downsize where possible
 - Review your life, have important conversations and bring relationships in order
- ☐ **Shape Your Legacy**
 - Create something meaningful and lasting for your loved ones, a community, a group or the world