

GET YOUR ESTATE AFFAIR TOGETHER CHECKLIST

Will & Power of Attorney (POA)

- I have completed my Will & POA and listed:
 - Durable Power of Attorney for Financial, Digital, and Medical, and back-up person(s)
 - Custody of child(ren) and a back-up person (and pets)
 - Distribution of assets and personal items
- The will is signed, notarized, and a copy has been given to those listed.
 My copy of my will is located here: _____

Living Will

- I have completed my Living Will (also called an Advance Care Directive):
 - Named a healthcare advocate and a back-up person
 - Additional information and notice to your doctor
 - Discussed your wishes friends and family (wants and don't want)
 - Discussed or written down the type of funeral or memorial service you desire and any instructions about burial or cremation
 - Considered where and how I would like to be cared for if I were terminally ill and discussed this with those closest to me
- The will is signed, notarized, and a copy has been given to those listed.
 My copy of my living will is located here: _____

Insurance

- I have researched Life Insurance options and purchased the best possible plan for me and/or my family.
 - I have researched Short term Disability and completed all steps.
 - I have researched Long term Disability and completed all steps.
- A copy of my policy is located here: _____

Money

- I have reviewed my financial situation and, if necessary, discussed this with those closest to me.
- I have completed a budget and track monthly actual costs to my budget.
- I have _____ weeks/months of expenses saved in case of emergency.
- I have a plan to meet my goal _____ by this date _____.
- I have a long-term savings plan and/or retirement plan.

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Details

- I have listed my Personal Details out in case of emergency or some one else needs to retrieve it (passwords, contact information, accounts, etc.):

My copy of my will is located here: _____

Personal

- I have thought about my relationships and how I want to move forward to resolve any unfinished business.
- I have reached out to those people.
- I have deeply considered how my life lines up with my values and priorities, how I am spending my energy, and what I want to do differently to have the life that is meaningful and important to me.

GETTING STARTED

What worries me most: _____

Been on my list longest: _____

So relieved once it is done: _____

I will do _____ by _____

I will ask _____ to help and/or keep me accountable.