WISER®

Saving
Investments
Insurance
Social Security

Improving the long term financial security of all women through education and advocacy.

Checklists for End-of-Life Planning

One of the most important things you can do for the people who mean the most to you is prepare for when you are gone. Having your financial affairs, materials and end-of-life instructions in order will give you all peace of mind. Listed below are checklists to help you when organizing your affairs.

Documents for End of Life Planning

- ☐ Durable Power of Attorney for Finances
- ☐ Domestic Partnership Agreement
- ☐ Living Trust
- ☐ Last Will and Testament
- ☐ Health Care Power of Attorney/Health Care Proxy/Durable Medical Power of Attorney
- ☐ Living Will
- ☐ Organ or tissue donor designation

List of Your Assets and Liabilities

- ☐ Real Estate/Mortgages
- ☐ Savings Accounts/Plans
- ☐ Checking/Bank Accounts
- ☐ Investment Accounts
- ☐ Life Insurance/Insurance Polices
- ☐ Online Accounts
- ☐ Pension/Retirement Benefits
- ☐ Outstanding Loans
- ☐ Credit Cards

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List of People to Contact and Where They Can Be Reached:

- ☐ Anyone named in your will
- ☐ Close Friends
- ☐ Business Associates
- ☐ Religious & Social Organizations
- ☐ Beneficiaries of your:
    - IRA
    - Annuity
    - Life Insurance
    - Other
- ☐ Your Attorney
- ☐ Your Executor/Trustee

Make Funeral Arrangements or specify what funeral arrangements you want:

- ☐ Preferred Funeral Home
- ☐ Funeral Home Director Information
- ☐ Viewing
- ☐ Buried or Cremated
- ☐ Funeral or Memorial Service
- ☐ Private Service – Religious/Denomination
- ☐ Military Service
- ☐ Eulogy, Music and/or Readings
- ☐ Pall Bearers
- ☐ Headstone or Marker
- ☐ Where to place remains
- ☐ Obituary
- ☐ Memorials – donations in your name to charities or organizations

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