

# Checklist Estate & Financial Planning Documents

# Last Will and Testament:

- □ I have completed my Will and listed:
  - Executor/Executrix
  - Alternate executor/executrix
  - Custody of children and pets (if applicable)
  - Distribution of assets and personal items
- The Will is signed, witnessed, notarized, and a copy has been given to those listed in the Will

The original and a copy of my Last Will and Testament is located here (list location):

# **Durable Power of Attorney**

- □ I have completed my Durable Power of Attorney and listed:
  - Power or Attorney and alternate person
- □ The Durable Power of Attorney is signed, witnessed, notarized, and a copy has been given to those listed in the Durable Power of Attorney.
- □ The original and a copy of my Durable Power of Attorney is located here (list location):

# Living Will:

- □ I have completed my Living Will:
  - Medical Power of Attorney and alternate person
  - Advance Directives
  - Additional information and notice to your doctor
  - Discussed your wishes with your family and friends
  - Discussed or written down the type of funeral or memorial service you desire and any instructions about burial or cremation
  - I have 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 Living Will is signed, notarized and a copy has been given to those listed.
- □ The original and a copy of my Living Will is located here:



# Life Insurance Policies

- I have made a list of all life insurance policies, along with the amounts of each policy
- □ I have designated beneficiaries on all policies

My life insurance policies are located here:

#### **Social Security Administration**

- □ I have contacted my local office of the Social Security Administration and completed their forms to designate a representative payee.
- □ I have named the following individual as my representative payee:

#### 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 accident or emergency
- □ I have a savings plan and/or retirement plan

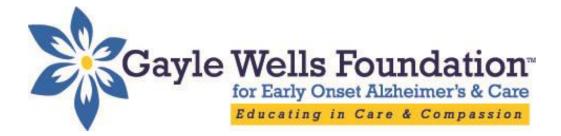
# **Personal Details:**

□ I have listed my personal details out in case of emergency or if someone else needs to retrieve it (passwords, contact information, accounts, etc.)

A copy of my personal details is located here:

#### Personal Items:

- □ 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.



#### **Family & Friends Contact Information**

List name, address, email address, phone number and relationship for your spouse/partner, children, siblings, parents and other individuals that you consider family and are part of your daily life and care.

A copy of my family and friends contact information is located here:

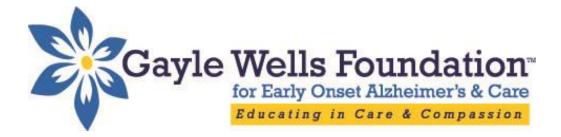
**Licenses and Policies** (marriages, birth, divorce, military discharge papers, life insurance, long-term care, funeral/burial, car insurance, home insurance, etc.)

Copies of my licenses and policies are located here:

# Banking and Business – I have made a list for the following that includes the bank/company name and contact information:

- Checking accounts
- Savings accounts
- Other bank accounts
- 401k(s)
- Other savings/retirement funds
- Stock
- Accounts on auto-pay
- College savings (529 plan, etc.)
- Debt (credit cards, school loans)
- Mortgage

A copy of my banking and business accounts and contacts is located here:



# Passwords - I have made a list of username and passwords for the following:

- Home computer(s)
- □ Work computer(s)
- Laptop/iPad/Kindle or other electronic devices
- Online banking accounts
- Online loan accounts (mortgage, credit cards, student loans, etc.)
- Online monthly payment accounts (i.e. electricity, water, etc.)
- Cell phones
- Email addresses
- □ Social networking sites
- Other online accounts (Netflix, Amazon, iTunes, etc.)

A copy of my passwords is located here: