



## 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):  

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### Durable Power of Attorney

- I have completed my Durable Power of Attorney and listed:
  - Power of 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):  

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### 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:  

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**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:

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**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:
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**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:

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**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.



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**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:

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**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:

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**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:

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**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:

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