END OF LIFE PLANNER

Name _____ Started _____ Last reviewed _____

Legal papers

- [ ] Will signed and witnessed, original location noted
- [ ] Executor named and has agreed to act
- [ ] Healthcare power of attorney signed
- [ ] Living will or advance directive signed
- [ ] Financial power of attorney signed
- [ ] HIPAA release naming who may talk to doctors
- [ ] Trust papers and trustee noted, if any
- [ ] Copies given to agent and executor
- [ ]

Medical and care wishes

- [ ] Doctors, specialists and pharmacy listed
- [ ] Medication list current (dose, prescriber)
- [ ] Allergies and conditions written down
- [ ] Resuscitation wishes recorded (DNR or POLST)
- [ ] Preferred place of care (home, hospice, hospital)
- [ ] Comfort and pain relief preferences noted
- [ ] Organ donation choice recorded
- [ ]

Money and accounts

- [ ] Bank accounts listed with contact details
- [ ] Beneficiaries checked on retirement accounts
- [ ] Life insurance policies and where kept
- [ ] Beneficiaries checked on insurance and POD accounts
- [ ] Mortgage, loans and credit cards listed
- [ ] Pension, Social Security or VA details
- [ ] Safe deposit box and key location
- [ ] Regular bills and autopays listed
- [ ]

Home, pets and digital life

- [ ] Deed, vehicle titles and lease papers located
- [ ] Pet carer, vet and medication noted
- [ ] Password manager named, and who can open it
- [ ] Phone and computer unlock plan made
- [ ] Email, cloud and photo accounts listed
- [ ] Social media wishes noted
- [ ] Subscriptions to cancel listed
- [ ]

People to tell

- [ ] First calls: closest family and friends
- [ ] Lawyer, accountant and financial adviser
- [ ] Employer or HR contact
- [ ] Faith leader, clubs and community groups
- [ ]

Funeral and memorial wishes

- [ ] Burial, cremation or other choice
- [ ] Funeral home or prepaid plan named
- [ ] Type of service, or no service
- [ ] Music, readings, flowers or donations
- [ ] Cemetery plot or deed location
- [ ] Obituary notes and photo chosen
- [ ]

Letters and legacy

- [ ] Letters to family written and placed
- [ ] Items for specific people listed
- [ ] Photos and stories labelled
- [ ] Binder location told to two people
- [ ] Review date put on the calendar
- [ ]

Never write passwords on this sheet. Name where they are kept instead.