

End of Life Planning Checklist

An advance directive is important, but it's just one piece of the puzzle. A complete end of life plan covers your medical decisions and your financial, legal, and personal affairs. Here's what a thorough end of life planning checklist actually looks like, just as an overview:

THE CHECKLIST

☐ **Advance Directive / Living Will**

Your healthcare decisions in writing, legally documented

☐ **Healthcare Power of Attorney**

Who makes medical decisions if you can't

☐ **Financial Power of Attorney**

Who manages your finances if you become incapacitated

☐ **Will or Trust**

How your assets are distributed after death

☐ **Beneficiary designations**

Updated on all accounts, insurance policies, retirement funds

☐ **Life insurance policies**

Policy numbers, company, and where to find the documents

☐ **Bank and investment accounts**

Account numbers, institutions, login information (stored securely)

☐ **Digital accounts and passwords**

Email, social media, subscriptions — what to close, what to memorialize

☐ **Property deeds and vehicle titles**

Where they're located, who inherits

☐ **Funeral and burial decisions**

Burial vs. cremation, service preferences, prepaid arrangements if any

☐ **Letter of instruction**

The informal human document — your pets, your belongings, your final decisions in plain language

☐ **Location of all the above**

Someone needs to know where to look