

BE Ready:

Checklist for End-of-Life Planning

Life is fleeting and comes with no guarantees, but if you plan ahead you can spare your loved ones a great deal of stress and ensure that your deepest wishes are carried out. Use this checklist to get your records and papers in order. Then store everything in a safe place that your family members know about and can access. **Karen Wyatt MD: www.karenwyattmd.com**

1. ____ **Will:** Make sure it is updated regularly and reflects your wishes.
2. ____ **Trust Documents** for any family or charitable trust you have established
3. ____ **Bank Accounts:** List all accounts with numbers, beneficiaries
4. ____ **Credit Cards:** List all cards and account numbers along with cancellation info
5. ____ **Social Security Number**
6. ____ **Birth Certificate**
7. ____ **Marriage Certificate** (If applicable)
8. ____ **Veteran's Discharge Papers:** (If applicable)
9. ____ **Insurance Policies:** Record policy numbers and contact info for ALL policies
10. ____ **Business Agreements and Contracts**
11. ____ **Real Estate Deeds**
12. ____ **Stock Holdings Certificates**
13. ____ **Savings Bonds**
14. ____ **Automobile Title(s)**
15. ____ **Cemetery Lot and Marker** (If pre-purchased)
16. ____ **Funeral Preferences** (If applicable)
17. ____ **Advanced Directive** or Living Will: specify your wishes for care at the end-of-life
18. ____ **Durable Power of Attorney** or Health Care Proxy
19. ____ **Internet Information:** Websites, email, or ecommerce accounts with passwords
20. ____ **Auto-Pay Accounts:** List any accounts or products that are automatically billed to you or deducted from your bank account each month