
FROM “IN CASE ANYTHING HAPPENS”

End-of-Life Planning Checklist

The whole job, in the order it should be done. Work through it over a few evenings.

If time is limited, do these five first, in this order. Nobody else can do them for you later.

THE SHORT VERSION

- ☐ Name a **healthcare proxy** and sign an **advance directive**
- ☐ Check **beneficiary forms** and get the **will** signed
- ☐ Write down the **phone passcode**, the **email password**, and the **list of accounts**
- ☐ Say your **funeral wishes** out loud to one person, then write them down
- ☐ **Tell that person** where the file is

1. CARE DECISIONS — ABOUT 1 HOUR

- ☐ **Healthcare proxy** named — one person, plus a backup. Ask them first
- ☐ **Advance directive / living will** written — the treatments you would and would not want
- ☐ **POLST or portable medical order**, if seriously ill — ask your doctor
- ☐ **Where you’d want to be** — home, hospice facility, hospital. Tell your proxy
- ☐ **Hospice and palliative care** preferences
- ☐ **Organ and tissue donation** decision — recorded, and told to your proxy
- ☐ **Copies given out** — proxy, backup proxy, doctor’s office, front of your file

2. LEGAL DOCUMENTS — 1 TO 2 EVENINGS

- ☐ **Will** (or living trust) signed and witnessed
- ☐ **Executor** chosen and told — and told where the will is
- ☐ **Durable power of attorney** for finances
- ☐ **Beneficiary designations** checked — every retirement account, life policy, payable-on-death account
- ☐ **Guardian** named for minor children, in the will
- ☐ **Deeds and titles** checked — how your home and vehicles are owned
- ☐ **Originals in one known place** — attorney’s name on the front of the file

Organizer’s list: what to decide, gather, and tell. Not legal, financial, or medical advice. Full explanations and links to the free forms: incaseanythinghappens.com/blog/end-of-life-planning-checklist

3. THE MONEY MAP — 1 EVENING

- ☐ **Bank accounts** — institution and type for each
- ☐ **Retirement accounts** — every 401(k) from every old employer, IRAs, pensions, annuities
- ☐ **Investment and brokerage accounts** — stock plans, any crypto, with a note on how to get in
- ☐ **Life insurance** — insurer, policy number, where the policy is. Include any through work
- ☐ **Other insurance** — health, long-term care, home, auto, any burial or funeral policy
- ☐ **Property** — home, land, vehicles; where deeds, titles and mortgage papers are
- ☐ **Debts** — mortgage, cards, loans, medical bills
- ☐ **Income that stops or changes** — Social Security, pension, VA benefits
- ☐ **Recurring payments** — subscriptions, auto-pays, storage units
- ☐ **Safe deposit box or home safe** — where, where the key or combination is, who has access
- ☐ **Last tax return** — where it is

4. DIGITAL ACCESS — 30 MINUTES

- ☐ **Phone passcode** written down — sealed with your papers, not taped to the phone
- ☐ **Primary email password** written down
- ☐ **Password manager master password** — or your ten most important logins on paper
- ☐ **Apple Legacy Contact** set
- ☐ **Google Inactive Account Manager** set
- ☐ **Two-factor backup codes** printed
- ☐ **Social media wishes** — memorialize, delete, or leave alone, per account

5. FUNERAL AND BODY WISHES — 1 HOUR

- ☐ **Burial or cremation** — if burial, where; if cremation, what to do with the ashes
- ☐ **Service or no service** — religious or not, big or small, and where
- ☐ **Anything already paid for** — a plot, a pre-need contract, a burial policy. Where the paperwork is
- ☐ **Who should speak, and what music** — optional
- ☐ **Obituary basics** — the facts you'd want right, and anything you'd want left out
- ☐ **Budget or a ceiling** — “please don't spend more than ____”

6. PEOPLE, PETS, AND THE FILE ITSELF — 30 MINUTES

- ☐ **The call list** — family, closest friends, employer's HR, attorney, financial advisor, Social Security
- ☐ **Pet care plan** — who takes them, the vet, any money set aside
- ☐ **Personal messages or letters** — optional
- ☐ **Dependents' essentials** — their doctors, medications, routines, and who steps in
- ☐ **One place for everything** — a folder, binder, or planner
- ☐ **One person told** where it is
- ☐ **A yearly review date** — your birthday month is easiest to remember

WRITE IT HERE

Where all of this is kept

The one person I told, and the date

I review this every year in the month of
