

HOSPICE GIVING FOUNDATION

LIFE STAGES: FINANCIAL PLANNING FOR PEACE OF MIND

YOUR PREPAREDNESS CHECKLIST

This list provides a look at the many aspects of personal and financial planning that will assist you and your loved ones when needed. Review the Important Documents Checklist to help you gather key information.

Notes to My Family is a tool that helps you catalog all this important information. You can download your complimentary copy of [Notes to My Family](#) from hospicegiving.org.

Use this checklist to help you get started in preparing for your personal peace of mind.

Prepare a Contact List

- List the names and phone numbers of people who should be notified of a serious illness, change in health status, or in the event of death (immediate family, power of attorney, etc.)
- Make a list of people who should be notified and invited to the funeral/memorial. Make a note if you prefer that someone should not attend your service/memorial

Update Your Will/Trust

- Ensure your will or trust accurately reflects your wishes for distribution of your remaining assets upon your death
- This should be kept with your Power of Attorney (see below) and Advanced Directive (see below)
- People who should have a copy: Lawyer, You, Power of Attorney (whoever you decide)

Plan for Passwords and Social Media

- Be sure to document your cell phone password for those authorized to access your device
- Make sure your passwords are current and in a secure place
- Be sure those designated to make decisions on your behalf know where all your passwords can be found
- Determine what you want done with your social media, such as FaceBook
- There are guidelines available on social media sites to help you make such decisions

Designate Power of Attorney (when necessary)

- Give someone the power to make financial decisions for you, when you are not able to make those decisions for yourself
 - Remember: accidents happen that can result in your inability to make decisions, so plan ahead
 - People who should have a copy: Lawyer, You, Power of Attorney
- Fill out Advance Directive & POLST
 - Designates your medical wishes
 - Meet with your physician to review and sign your POLST
 - People who should have a copy: Doctor, you, Power of Attorney, local hospital
 - Keep a copy in a glove compartment of your car

Consider your wishes:

- What type of service you would like
- Where you want the service
- Where you are to be buried/cremated
- Think about what you would like in your obituary and who might write it for you
- Burial/Cremation/Donation to Science - be sure to complete the legally required permit forms for your state in order that your loved ones can carry out your wishes

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