



Disability and End of Life Planning Checklist

Essential:

- Will
- Trust(s)
- Durable Power of Attorney
- Health Care Proxy/HIPAA Release
- Living Will
- Funeral insurance policies or pre-paid funeral arrangements
- Letter describing last wishes (if desired)

Include either current copies of these documents or a listing with locations:

- Deeds
- In-force life insurance policies and annuity contracts
- Bank statements showing bank contact information and account numbers
- Brokerage statements with account number, broker name and contact information
- IRA, pension, all retirement fund information, as appropriate
- Income tax returns
- Homeowners' insurance policies
- Auto and vehicle insurance policies
- Long-term care insurance policies
- Disability policies
- Business owners: corporate/company records (including share certificates and shareholder agreements)
- Titles to Vehicles

Also consider:

- Contact info for Executor, Successor Trustee, Financial Advisor, Accountant, Insurance Agent
- Names and numbers of your primary care physician and any specialist(s) as well as a list of prescription medications
- A copy of Medicare, Medicaid or other health insurance cards, and any other medical information you feel is relevant.
- Birth Certificate
- Marriage License
- Divorce Decree
- Employer information
- Military discharge
- Citizenship documents
- List of credit cards
- List of debts