

The Ultimate End-of-Life Planning Checklist

Plan ahead with clarity, compassion, and care.

1. Legal and Financial Documents

- ☐ Last Will and Testament
- ☐ Living Will / Advance Healthcare Directive
- ☐ Durable Power of Attorney (Financial & Healthcare)
- ☐ Trust Documents (if applicable)
- ☐ HIPAA Authorization Form
- ☐ Letter of Instruction

Tip: Store copies in a clearly labeled folder (physical and digital). Share with your executor or a trusted person.

2. Funeral and Memorial Preferences

- ☐ Burial or Cremation Decision
- ☐ Preferred Cemetery or Cremation Provider
- ☐ Memorial or Funeral Service Details (type, tone, location)
- ☐ Obituary Information (key facts, personal notes)
- ☐ Music, Readings, and Participants
- ☐ Guest or Notification List

Tip: Consider writing your own obituary or outline. It's a gift to your loved ones.

3. Personal and Digital Information

- ☐ Password Manager or Digital Legacy Plan
- ☐ Social Media Instructions (memorialize or delete?)
- ☐ Family Heirlooms and Personal Items (who gets what?)
- ☐ Photos and Keepsakes (digital access or albums)

Mini Guide: Your online presence is part of your legacy. Be clear about what to preserve or delete.

4. Financial Accounts and Insurance

- ☐ Bank and Investment Accounts (with beneficiaries)
- ☐ Life Insurance Policies
- ☐ Outstanding Debts (loans, credit cards, personal debts)
- ☐ Retirement Accounts (401k, IRA, etc.)
- ☐ Pension or Employer Benefits

Tip: Create a one-page “Financial Snapshot” for quick reference.

5. Family and Legacy Planning

- ☐ Personal Messages or Legacy Letters
- ☐ Charitable Giving or Donations
- ☐ Family Traditions or Cultural Requests
- ☐ Pet Care Instructions (guardians, routines)

Idea: Write a “Life Lessons” letter for your children or loved ones.

6. Post-Funeral Planning

- ☐ Executor Contact List (lawyers, financial advisors, etc.)
- ☐ Subscription or Utility Cancellations
- ☐ Home and Property Management Instructions
- ☐ Final Document Storage Location

Add-on: Create a short form titled “After I’m Gone” with top-priority actions and contacts.

Final Action Steps

- ☐ Schedule time to complete each section
- ☐ Have a conversation with your family or executor
- ☐ Explore tools and support to help you plan
- ☐ Keep documents and instructions up to date