

## CHECKLIST FOR END OF LIFE PLANING

Place all end of life planning information in one place and tell one or more friends or family members where it can be located when needed – you may even want to provide one or more of these individuals with a copy of all of this information in addition to letting them know where to find the originals. The following is a list of possible things you may want to include when making your end of life plans. Use it as a checklist or for easy reference when putting your plan together. [Click on the blue highlighted Living Smart form to be taken directly to that form:](#)

- \_\_\_ **Special Bequest of Personal Items:** List specific possessions you want to leave to designated people or organizations upon your death. Complete [Living Form No. 03](#) in the End of Life Planning section.
- \_\_\_ **Funeral, Burial, Memorial Service and Related Instructions:** Failure to put your wishes in writing can cause not only dissention in your family but maybe even lasting family animosity. To avoid possible family strife, complete [Living Smart Form No. 02](#) in the End of Life Planning section.
- \_\_\_ **Important Personal Information:** This information includes your social security number, safety deposit box information, location of important papers, the name of your accountant and other important information. Complete [Living Smart Form No. 01](#) in the Household and Personal Matters section.
- \_\_\_ **List of People and Organizations to be Notified of Your Death:** Complete [Living Smart Form No. 4](#) and [Living Form No. 05](#) in the End of Life Planning section.
- \_\_\_ **Computer, E-Mail, Cell Phone and Other Passwords:** Upon your death, especially if it's sudden and unexpected, you will want someone to close your various on-line social media and other accounts like Ebay, Amazon, etc; check messages on your home and cell and notify callers of your death; check your emails and let senders know of your death then close the accounts; etc. Complete [Living Smart Form No. 10](#) in the Household and Personal Matters section.
- \_\_\_ **List of All Loans and Mortgages:** Your heirs will need this information to settle your debts. Complete [Living Smart Form No. 01](#) in the Personal Finances section.
- \_\_\_ **List of All Credit Card Accounts:** Your heirs will need this information to immediately close the accounts to protect your estate from identity theft as well as to arrange for payments of all outstanding balances. Complete [Living Smart Form No. 03](#) in the Personal Finances section.
- \_\_\_ **List of All Bank Accounts:** Complete [Living Smart Form No. 05](#) in the Personal Finances section.
- \_\_\_ **List of All Investment and Non-Bank Accounts:** Complete [Living Smart Form No. 07](#) in the Personal Finances section.

- \_\_\_ **List of Non-Liquid Assets:** If you have pieces of furniture, art work, books, stamp collections, jewelry, cars, or other items that are particularly valuable they should be included in a written list so these items don't end up in a yard sale – or worse. Complete [Living Smart Form No. 09](#) in the Personal Finances section.
  
- \_\_\_ **List of All Insurance Policies:** In addition to cashing in any life insurance, burial or similar policies in force at the time of your death, your heirs will need a written record of all of your other insurance policies so they can be cancelled and any unamortized premiums already paid returned to your estate. Complete [Living Smart Form No. 10](#) in the Personal Finances section.
  
- \_\_\_ **Ownership of Pet(s) Upon Death:** Make certain that your pet(s) have a good home when you die by designating in writing who will be undertaking their care upon your death. Complete [Living Smart Form No. 14](#) in the Children and Pets section.
  
- \_\_\_ **Important Pet Information:** The person caring for your pet(s) after you die will need important information about your pet including any special needs, medical conditions and information, behavior matters like fear of certain situations, items, etc. Complete [Living Smart Form No. 09](#) in the Children and Pets section.
  
- \_\_\_ **Pet Care Instructions:** The person caring for your pet(s) upon your death will need detailed care information including feeding instructions, medication schedule, exercise and grooming requirements, the name of their vet, etc. Complete [Living Smart Form No. 11](#) in the Children and Pets section.
  
- \_\_\_ **Temporary Child Care Instructions:** If you are a single parent to minor children, your sudden death could require someone other than the person who will have permanent custody take care of your children on an emergency basis until the permanent guardian can take custody. In this event, the temporary care provider will need temporary care instructions. Complete [Living Smart Form No. 03](#) in the Children and Pets section.
  
- \_\_\_ **Detailed Child Care Instructions:** Whoever will be caring for your child or children after your death will need detailed information about their diet, medical needs, school information, extracurricular activities, etc. Complete [Living Smart Form No. 04](#) in the Children and Pets section.
  
- \_\_\_ **Home Care Information:** List individuals and companies you have service contracts with (HVAC, pest control, etc.); individuals or companies that perform regular, scheduled services to your home (lawn care, house cleaning, etc.); and any other goods and services that are automatically renewed with a credit card they have on file (computer virus protection, Angie's list, subscriptions, etc.). Complete [Living Smart Form No. 04](#) in the Household and Personal Matters section.
  
- \_\_\_ **Home Utility and Service Providers:** Your heirs will need to know the name and account information for all home utilities, phone service, television service provider, internet access, etc. to either close the accounts or change the name on the account. Complete [Living Smart Form No. 05](#) in the Household and Personal Matters section.

- \_\_\_ **Home Security Information:** This information is needed so your heirs can turn the system on and off as needed to protect your home and contents until it is sold or occupied again. This information is also needed to close the account when appropriate. Complete [Living Smart Form No. 07](#) in the Household and Personal Matters section.
  
- \_\_\_ **Work/Business Notification List:** Leave a list of the people/organizations to be notified in the event of your death including associates, customers, vendors, landlords, etc. Complete [Living Smart Form No. 02](#) in the Small Business section.
  
- \_\_\_ **List of Business Bank Accounts:** Complete [Living Smart Form No. 03](#) in the Small Business section.
  
- \_\_\_ **List of Business Loans, Credit Cards and Other Debts:** Your heirs will need this information to settle your estate and to close accounts or to continue to run the business. Complete [Living Smart Form No. 04](#) in the Small Business section.
  
- \_\_\_ **Information Needed to Access business Computers, Phones, Etc.:** Whether your business will be closed, sold, or run by your heirs, your heirs will need to be able to access your work email, phone and other messaging devices as to be able to access any work related website, social media accounts, etc. Complete [Living Smart Form No. 06](#) in the Small Business section.
  
- \_\_\_ **Advance Directives:** Every adult should have written documents appointing a trusted person to make healthcare and end of life decisions on their behalf in the event they are unable to make those decisions themselves. Living Smart doesn't provide legal documents but for those of you who don't know where to find legal assistance, several options can be found in the [Legal Resources](#) section of the website. Living Smart is in no way affiliated with these organizations and receives no compensation from them.
  
- \_\_\_ **Will:** Failure to make a Will could result in long term family discord and is the final gift we leave to those we care about. Living Smart doesn't provide legal documents but for those who don't know where to find legal assistance, several options can be found in the [Legal Resources](#) section of the website. Living Smart is in no way affiliated with these organizations and receives no compensation from them.

Add Any Additional Items or Matters Unique to Your Situation:

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