



Peace of Mind Planning Checklist

A Simple Guide for Organizing Your Wishes and Important Information

Name: _____s

Date Started: _____

Last Updated: _____

1. Healthcare Planning

- Complete an Advance Healthcare Directive/Living Will
- Designate Healthcare Power of Attorney
- Discuss medical care preferences with loved ones
- Share copies with healthcare providers
- Keep documents in an accessible location

Notes:

2. Legal & Financial Planning

Estate Documents

- Create or update your will
- Review trust documents (if applicable)
- Update beneficiary designations
- Designate Financial Power of Attorney
- Review estate plans every 3–5 years

Financial Information

- List of bank accounts
- List of investment and retirement accounts
- Document insurance policies
- Record recurring bills and subscriptions
- Create a list of professional contacts (attorney, financial advisor, accountant)

Document Location:

3. Important Personal Documents

- Birth certificate
- Social Security card/information
- Marriage or divorce records
- Military records (if applicable)
- Property deeds or vehicle titles
- Passport
- Insurance information
- Emergency contact list

Stored In:

4. Funeral & Memorial Preferences

- Burial, cremation, or body donation preference documented
- Memorial service preferences written down
- Music or reading selected
- Obituary preferences noted
- Charitable donation preferences identified
- Family members informed

Special Instructions:

5. Body Donation Planning (If Applicable)

- Research body donation programs
- Complete registration paperwork
- Keep donor information with important documents
- Inform family and decision-makers of your wishes
- Save organization contact information

Organization Name & Phone Number:

Reference Notes:

6. Digital Life

- Password manager or secure password list updated
- Email accounts documented
- Social media preferences recorded
- Online subscriptions identified
- Digital photos and files organized
- Trusted person knows how to access information

7. Home & Personal Information

- Household bills documented
- Utility account information available
- Safe deposit box or safe location recorded
- Spare keys identified
- Pet care instructions documented
- Home maintenance information shared

8. Loved Ones & Communication

- Emergency contacts updated
- Family meeting held to discuss wishes

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- Healthcare decision-maker informed
- Executor informed of responsibilities
- Important contacts list completed

9. Your Personal Legacy

- Write a letter to loved ones
- Record family stories or memories
- Organize photographs
- Share favorite recipes or traditions
- Document values and life lessons
- Create a bucket list or goals for the future

What do you hope people remember most about you?

Annual Review

- Healthcare documents reviewed
- Beneficiaries confirmed
- Contact information updated
- Financial information current
- Family informed of any changes

Review Date: _____

Next Review: _____

Remember, end-of-life planning isn't about preparing for the end. It is about making thoughtful decisions that reflect your values and make things easier for the people you love. Every item you check off is one more gift of clarity, comfort, and peace of mind for yourself and your family.

Additional Notes: _____

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