

# Pre-planning checklist

Facing the inevitability of death is never easy. However, these 12 steps can ease the burden on your loved ones when the time comes.

☐ **1. Who do you want to designate as your medical proxy?**

Fill out an Advance Medical Directive to ensure your medical care will be in accordance with your values and wishes.

☐ **2. Who should be notified?**

Create a list of key contacts to help your family notify the right people without delay.

☐ **3. Where do you want to be buried?**

Pick a plot, pay for it, and write down its location - no confusion later.

☐ **4. Have the funeral arrangements been paid for?**

Funeral plans and burial are two separate matters. Make sure both are arranged, including coordination with the Chevra Kadisha.

☐ **5. What kind of funeral service do you want?**

Chapel or graveside? Would you like certain people to officiate or to speak? Do you want your family to say kaddish? Clearly specify your wishes for a smoother process.

☐ **6. Do you have a will?**

Create a will and ensure that someone knows where to find it. It can save your loved ones from unnecessary heartache.

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☐ **7. Where are your life insurance policies?**

Ensure your life insurance is in place to prevent financial strain on your family. Keep the details accessible.

☐ **8. Where are your bank accounts?**

List all accounts, safe deposit boxes, and passwords. Ensure someone knows where to find them.

☐ **9. How are your accounts titled?**

Review account titles and consider setting up trusts to simplify matters and protect your family from probate.

☐ **10. What are your passwords?**

List all digital account passwords and share them with a trusted person for easy access when needed.

☐ **11. Are there any outstanding debts?**

Address debts now to prevent them from becoming a burden on your loved ones later.

☐ **12. Where are your important papers stored?**

Perhaps most importantly, gather all of the above documentation and place it in a safe, accessible location. Ensure your family knows where to find them when needed.