

End-of-life planning checklist

12 documents you should consider



Your Estate Plan

1

Last will and testament

- ☐ Name a guardian for minor children
- ☐ Name a guardian for your pets
- ☐ List all personal property and decide which people/charities you want to receive each asset
- ☐ Name an executor to carry out the terms of your will

2

Revocable living trust

- ☐ List all personal property and decide which people/charities you want to receive each asset
- ☐ Transfer your personal property into the trust
- ☐ Name a successor trustee to manage your trust after you pass away

3

Beneficiary designations

Name a beneficiary for all non-probate assets, including:

- ☐ 401(k) and IRA accounts
- ☐ Life insurance policies
- ☐ Pensions

4

Durable financial power of attorney

- ☐ Choose a financial agent to make important financial decisions for you
- ☐ Decide which financial decisions you want your agent to be able to make
- ☐ State in your document that you want it to be “durable”

5

Pet trust

- ☐ Establish and fund the pet trust
- ☐ Name a successor trustee to manage your trust after you pass away
- ☐ Name a guardian for your pets
- ☐ Include instructions about how the funds should be used to pay for your pet’s care (medical instructions, preferred nutrition/toys, etc)



Your Advance Care Plan

6

Durable medical power of attorney

- ☐ Choose a healthcare agent to make important medical decisions for you
- ☐ Decide which medical decisions you want your agent to be able to make
- ☐ State in your document that you want it to be “durable”

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Living will

- ☐ Outline your medical care preferences for your doctors and healthcare agent to follow
- ☐ Consider sharing this document with your healthcare agent to make sure they understand your wishes

8

Life insurance

- ☐ Consider your age, expenses, and number of dependents to choose a plan with appropriate coverage
- ☐ Revisit your plan every few years to determine if your needs have changed

9

DNR and POLST forms

Often used only by people with failing health or an existing diagnosis

- ☐ Ask your doctor to draw up a DNR
- ☐ Ask your doctor to outline your wishes for your end-of-life care in POLST forms



Other Documents

10

End-of-life housing arrangements

- ☐ Think about where you want to live in your final days. Consider cost, convenience, and other factors
- ☐ Share your preferences with your loved ones so they understand your wishes

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Instructions for your digital assets

- ☐ Consider using a digital vault or password manager to track important logins and passwords (including keys to cryptocurrency wallets)
- ☐ Consider naming a digital executor in your will to solely manage your digital assets

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Funeral instructions and preferences

- ☐ Burial, cremation, etc.
- ☐ Type of service you prefer
- ☐ Preferred charities for donations
- ☐ Write or outline your obituary
- ☐ Instructions for what should be written on your tombstone