End Of Life Planning Checklist

Our End of Life Planning Checklist is designed to help you organize your financial records and other important documents making it easier for your family, Personal Representative and possible successor Trustee to close out your financial affairs. Compiling and sharing this information ahead of time will help prepare these interested parties for their future role.

Deeds, Titles and Promissory Notes/Loans

- [ ] Real Estate Property deeds including timeshares (including any recent appraisals)
- [ ] Mortgage documents (including promissory/loan notes and home equity lines of credit)
- [ ] Other Promissory or Loan notes (including loans owed to the deceased)
- [ ] Vehicle titles and registrations (car, boat, RV, etc.)
- [ ] Membership certificates
- [ ] HUD-1 settlement sheet for purchase of house and any other real estate

Financial Accounts

Including most recent statements for all accounts and the list of Beneficiaries, if any.

- [ ] Bank accounts - checking, savings, CD's, etc.
- [ ] Investment/brokerage accounts
- [ ] Retirements accounts such as IRA's, 401(k)'s, 403(b)'s, etc.
- [ ] Stock certificates and bonds
- [ ] Annuity contracts
- [ ] Credit and debit card accounts
- [ ] User names and passwords for any online accounts
- [ ] List of safety deposit boxes, number & location where to find keys, and names of authorized users

Insurance Policies

- [ ] Life insurance (including premium payment records)
- [ ] Life insurance through employer
- [ ] Veterans' insurance
- [ ] Employers or pension insurance
- [ ] Funeral insurance (or other death-related benefit plans)
- [ ] Mortgage and/or credit insurance
- [ ] Credit card insurance (for balances)
- [ ] Credit life insurance for any other loan
- [ ] Health insurance (including Medicare or Medicaid, "Medigap" insurance, private health insurance, dental, and Long Term Care insurance)
- [ ] Property insurance (homeowners/renters insurance, car insurance, etc.)
- [ ] Workers' compensation insurance (and payment records)

Personal Information

- [ ] Names and contact information of closest family and friends
- [ ] Names and contact information of all lawyers, accountants, financial advisor, insurance agents including casualty, doctors, etc.
- [ ] Family Tree, if available (especially if there is no Will)
- [ ] Usernames and passwords for online accounts (including email accounts, financial records, social media accounts, etc.)
- [ ] Passwords to access computers, cell phones and other electronic devices

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Other Financial Records

- [ ] Survivor annuity benefit papers
- [ ] Employer/retirement benefit (pension) plans, pension/profit-sharing plans, etc.
- [ ] Veterans' benefit records
- [ ] Disability payment documents (State, Veterans', etc.)
- [ ] Income statements for the current year (Social Security, pension, IRA's, annuities, employment and other income records)
- [ ] IRS income tax returns (for the current and previous year)
- [ ] IRS gift tax returns (if any, for all years)
- [ ] Property tax records and statements
- [ ] Business interests held, financial statements and agreements, contracts, etc.
- [ ] Loan papers
- [ ] Other - investment records, etc.

Legal Papers

- [ ] Will including any codicils
- [ ] Trusts including amendment and/or restatements
- [ ] Deceased's Final Instructions, Disposition Authorization, and/or Designated Agent forms (sometimes included in an Advance Directive such as a Durable Power of Attorney for Health Care, or in a Living Will)
- [ ] Memorandum of Tangible Personal Property (many Wills refer to this but often times clients do not prepare one)
- [ ] Digital asset powers (this may be included in Will, Trust or POA)
- [ ] Pre-paid funeral contracts including location of burial plot
- [ ] Organ/tissue donation record
- [ ] Social Security card (or number)
- [ ] Birth certificates (of all family members)
- [ ] Marriage license or certificate
- [ ] Military service papers, including discharge records
- [ ] Domestic Partnership Registration
- [ ] Court documents for adoptions and divorce (including any property settlement agreements, name changes, prenuptial agreements, etc.)
- [ ] Community Property Agreements
- [ ] Driver's license
- [ ] Passport, citizenship, immigration and/or alien registration papers
- [ ] Instructions regarding the care of a pet (if not already contained in a Will)