



Need to Know Checklist

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The Need To Know Checklist

Hereafter Partners aims to empower people to plan for the elements of a values-based death so that they can live a richer and calmer life to the very end.

While we have other tools that help you develop an understanding of what is important to you in life and in its last chapter, this resource is a **practical nuts-and-bolts checklist** to help you pull all the information together that will help those who walk with you on your final journey.

Discussing and gathering as many of these items **before** you need them will make for an easier road for your loved ones.



Need to Know Checklist

Medical & Legal



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Durable Power of Attorney for Health Care (legal document naming health care proxy/ies, may wish for it to be notarized)

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State-specific Medical Advanced Directive (consider completing for other states if you travel/live/spend time there)

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Personal statement of intention / Living will (not a legal document)

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State-specific POLST (Practitioner Orders for Life-Sustaining Treatment) with one original on your person, one original with health care proxy, and one copy in red folder on refrigerator

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HIPAA Release Forms to provide access for proxies to medical records and insurance information

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Durable Power of Attorney (unexecuted copy to the individual given the power; executed copy with the attorney to be retrieved when your instructions/threshold of abilities have been met)

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Medical Insurance and Long-Term Care Insurance Information (policy number, policy limits)

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Organ donation information* (registerme.com)

If you have requested a Do Not Resuscitate (DNR) order but want to donate organs, you should indicate that the desire to donate supersedes the DNR because it might be necessary to use machines to keep the heart beating until the medical staff is ready to remove the donated organs.

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Need to Know Checklist Legal & Financial



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Fully executed Last Will & Testament (signed, witnessed, and dated) and contact information for attorney

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Birth certificate, marriage/divorce certificates, prenuptial military service record documents

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Social Security card, driver's license, passport, other identification cards (or photocopies)

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List of accounts (financial, utilities, etc) including institutional contacts account numbers, balances, payment schedules; special note for any automated recurring payments

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Life insurance policies, pension and employee benefit information (policy numbers, beneficiary lists, and institutional contact information)

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Recent income tax returns (personal and business)

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Stock certificates (physical copies or information on location thereof)

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Real estate documents and deeds; automobile title and registration (consider transferring to trust before death)

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Need to Know Checklist

Organizational Details



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Discussion notes on how to handle important items not mentioned in the will

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Safe deposit box (or any locked safe) information: Where is it located, where is the key/code, what is the process for accessing?

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Contact information for financial planner, certified public accountant and personal point person (friend designated to coordinate help with errands, meals, and communication to others)

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Helpful home details (contact number of landlord, location of car keys, garage openers, gate codes, location of extra keys)

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Pet care instructions and preferences (type and location of food, feeding/walking/grooming schedule, favorite hiding spots/toys)

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List of your simple pleasures (favorite foods/snacks, pass-times, music, poetry, books, etc)

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Family history (written notes, conversations with children, oral history, family tree, location of cherished documents, recipes, etc)

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Letters to important individuals (love, thank, forgive)

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Memorial Details



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Funeral home contacts (some states require this for transport of the body) and **body disposition instructions**

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Memorial Plan (location, officiants and eulogizers, texts, music, beneficiaries of donations in lieu of flowers, favorite photographs to feature) and **obituary draft**

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Digital asset information and official access authorizations

Inventory of digital assets including email and social media accounts, website logins, domain names, virtual currency accounts, and lists of fiduciaries who have been designated through each website's online tools or specifically named in will as holding authority to access specific account/all digital assets

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Discussion notes on how to handle important items not mentioned in the will

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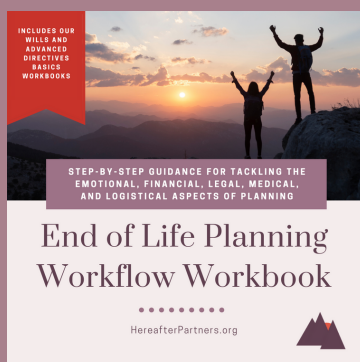
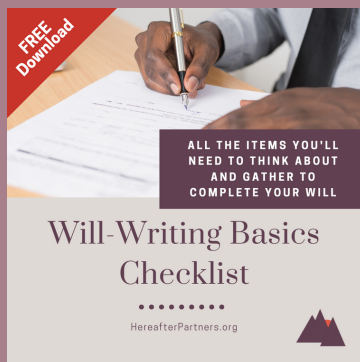
Notes on counseling and bereavement resources

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Just the beginning

Hopefully, this guide has provided you with one approach to End of Life planning conversations with your loved ones.

Check out our other downloadable resources at www.hereafterpartners.org.





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