

When someone passes away, it can be a stressful time.

To help your family for end of life planning, use this checklist of important papers to complete, then make a plan to store the information in a fire and waterproof safe.

1. Estate Planning

- Make or update your will
- Make a living will
- Create a durable powers of attorney
- Create an outline of your final instructions (funeral, burial, pets)
- Plan your financial wishes (who will inherit your estate – family or a foundation)
- Establish a trust if necessary
- Consider funeral preplanning (purchasing a lot, paying for funeral expenses, headstone or urn)

2. Insurance Planning

- Purchase or update life insurance
- Make sure your health/medical insurance is current
- Pension plans – make sure your beneficiary information is up to date
- IRA, 401(k) and other retirement plans - make sure your beneficiary information is up to date

3. Organizing Financial Records

- Create a list of financial accounts
- Create a list of valuable documents
- Make a list of your personal data
- Make arrangements for access to your safe-deposit box
- List all bills that need to be paid
- List income sources
- Ensure your family knows where important records are located.

4. Personal Planning

- Make sure you have an Advance Directive
- Ask someone you trust to assist in your final planning
- Designate a family member or friend with the locations of all of your belongings and your documents
- Any additional planning you may need including the care of your pets
- Compile a list of important contacts (lawyer, doctors, employers, insurance information)

5. Downsize Belongings

- Prepare ahead of time to make a transition easier if you get sick
- Talk with your loved ones and find out what they may want
- Donate or give away things you don't need and haven't used in a few years.