

The Complete End-of-Life Planning Checklist

Below is a comprehensive, practical checklist covering every major area of your plan. You can include this as a printable page or worksheet in your book.

A. Legal Documents

- Will completed and signed
- Trust created (if applicable)
- Power of Attorney (financial)
- Healthcare Directive
- HIPAA Release
- Guardianship documents (children or adults)
- Pet care agreement or pet trust
- Personal property memorandum

B. Financial Organization

- List of all bank accounts
- List of all investment and retirement accounts
- Beneficiary designations reviewed and updated
- List of credit cards and loans
- Insurance policies documented
- Income sources listed
- Debts and obligations listed

C. Home and Property

- Home ownership documents stored
- Mortgage or lease information included
- Utility accounts documented
- Home maintenance plan created
- Instructions for property access
- Inventory of valuable items completed

D. Digital Assets

- Password manager set up
- Master password documented
- Backup codes stored
- Device passcodes included
- List of digital accounts
- Instructions for digital photos and files

E. Funeral and Disposition

- Burial/cremation preference documented
- Service preferences documented
- Pre-paid plans included (if any)
- Funeral home contact information
- Obituary preferences (optional)

F. Dependents and Pets

- Guardians named
- Care instructions written
- Medical information included
- Daily routines documented
- Pet care plan completed

G. Executor Preparation

- Executor named
- Backup executor named
- Executor informed of their role
- Executor knows where documents are stored
- Executor has access instructions