

Getting Started: Your Checklist

Print it out, save it to your desktop, email it to yourself, send it to your partner – whatever it takes to keep it top of mind till you make it through the list. Take it from the top, and check off as you go.

Remember: Scan it once a year to make sure everything is up to date, important details change when you marry/divorce, have children, buy a home, etc.

Major life event = recheck your checklist

CHECKLIST

Get Started: Review this document completely and keep this on file with your will and other important documents.

Will:

- I have completed my Will and listed
 - Durable Power of Attorney for Financial and Medical, and back-up person(s)
 - Custody of child(ren) and back-up person
 - Distribution of assets and personal items

- The will is signed, notarized, and a copy has been given to those listed.

My copy of my will is located here: _____

Living Will:

- I have completed my Living Will
 - Medical power of Attorney and back-up person
 - Advance Directives
 - Additional information and notice to your doctor
 - Discussed your wishes friends and family
 - Discussed or written down the type of funeral or memorial service you desire and any instructions about burial or cremation
 - I have considered where and how I would like to be cared for if I were terminally ill and discussed this with those closest to me

- The living will is signed, notarized, and a copy has been given to those listed.

My copy of my living will is located here: _____

Life Insurance:

- I have researched Life Insurance options and purchased the best possible plan for me and/or my family
- I have researched Short term Disability and completed all steps
- I have researched Long term Disability and completed all steps

A copy of my policy is located here: _____

Money:

- I have reviewed my financial situation and, if necessary, discussed this with those closest to me
- I have completed a budget and track monthly actual costs to my budget
- I have _____ weeks/months of expenses saved in case of accident or emergency
- I have a plan in place to meet my goal to have _____ by this date _____
- I have a savings plan and/or retirement plan

Details:

- I have listed my Personal Details out in case of emergency or some one else needs to retrieve it (passwords, contact information, accounts, etc)

A copy of my details list is located here: _____

Notes and Next: *(any additional thoughts or notes)*