

## 10 Essential Steps to Organizing your End-of-Life Plan

1. 1. Explore values, wishes and needs for end-of-life matters
  - What is most important to me?
  - How do my values and beliefs inform my EOL planning?
  - What do I wish for my loved ones?
  - What will I need for my remaining days?
  
2. 2. Gather essential personal documents and determine important contacts
  - Personal information
    - What would the hospital need immediately? – Name, DOB, Insurance Number
    - What would my family/caregiver need to know?
    - Medication List, Allergies, Medical Conditions
  - Personal Documents – Driver’s License, SS Card, Medicare Card, Marriage/Divorce Papers, Military Documents, Citizenship Papers
  - Family Information – Names, Relationship, Contact Information
  - Dependent Information and Pet Information
  - Doctors and other Medical Professionals
  - Pharmacy, Hospital, other Medical Offices
  - Caregivers, Care Facility
  - Lawyer, Accountant, Financial Planner
  - People who are actively in my life
  - Groups, Clubs, Affiliations, Organizations, Place of Worship
  
3. 3. Organize key health and legal documents
  - Advance Health Care Directive
    - State my health care wishes
    - Designate who will speak for me: DPOA for Health Care (Agent, Proxy, Surrogate)
  - Will or Trust
  - Durable Power of Attorney (DPOA) for Finance
  - POLST (Physician Order for Life-Sustaining Treatment / DNR (Do Not Resuscitate) – Speak with my Doctor – Generally for those who are frail or seriously ill
  
4. 4. List financial and personal property information – TITLED CORRECTLY!
  - Bank and other Financial Accounts
  - Income, Bills, Debt, Auto-Deposits/Auto-Pays – Consider using a spreadsheet for this
  - Investments, Retirement, Traded Accounts (Stocks, Bonds, IRAs)
  - Real Estate, Rentals, Time Share
  - Valuable Assets – Vehicles, Collections, Art, Antiques
  - Insurance – Life, Health, Homeowner’s, Renter/Rental, Vehicle, Military, Disability
  - Income Tax Returns and their Location
  
5. 5. Compile practical information (technology, helpful home details)
  - Online Accounts

- Passwords – Where stored? Who has them?
  - Consider online password manager such as LastPass
  - Electronic Devices
    - User Name, Password, Location of Device
  - Websites Created by Me – URL, ID, Password
  - Helpful Home Details and Storage Unit – *List anything that might be useful for my loved ones to enter my home and make sure things run smoothly*
  - Location of Keys, Garage Door Code and Opener
  - Location of Safe and Combination, Who has it?
  - Hiding Places (NOT RECOMMENDED)
  - Name, Contact for Alarm Security System
6. Detail any current business, contractual and legal situations
- Business Documents and Instructions
  - Legal Matters
  - Trust for Someone Else
  - Loans of Money or Items
  - Cosigner
7. Review care options and set up memorial or funeral services and final resting place
- Caregiving and Hospice Preferences
  - Pet Care
  - Death Certificate Info – (Parents' Full Names, Birth States, My Ed Level)
  - Obituary – Bulleted List or Write my own, Who will write?
  - Organ or Body Donation – DMV or UCSF or other medical school
  - Memorial Celebration, Funeral – Prepaid Plans?
  - Final Disposition Wishes – Burial, Cremation, Other
8. Consider doing a life review and creating a personal legacy
- Life Review – Think back on my life – Write, Record, Video?
    - Anything unfinished or unsaid? Write letters? Call? Visit? Now is the time
  - Personal Legacy – Think forward...
    - How do I want to be remembered? Do I want to express something?
    - Tangible or Intangible
    - Letters to Loved Ones
    - Art, Favorite Recipes/Music/Poems
    - Bench in Favorite Park?
  - The Sky's the Limit!
9. Assemble vital documents and securely store them. Share key information with my loved ones or agent. Review and update documents periodically and when there is a change
10. Enjoy life knowing my affairs are in order and that I am leaving an invaluable gift to my loved ones!