

End of Life Planning Checklist

Personal information	
Full name:	Date of birth:
Previous name/s:	Place of birth:
Social Security number:	
Legal residence:	
Immediate family members and contact information:	
Prepare legal documents	List important information
<ul style="list-style-type: none"><input type="checkbox"/> Will<input type="checkbox"/> Advanced care directive<input type="checkbox"/> Enduring power of attorney<input type="checkbox"/> Living trust<input type="checkbox"/> Superannuation binding death benefit nominations<input type="checkbox"/> Organ donation preferences<input type="checkbox"/> Body donation consent form	<ul style="list-style-type: none"><input type="checkbox"/> Login details and passwords<input type="checkbox"/> Names and phone numbers of close friends, relatives, doctors, lawyers, and financial advisors<input type="checkbox"/> Names of banks and account numbers (checking, savings, credit union)<input type="checkbox"/> Organization memberships<input type="checkbox"/> Subscription services<input type="checkbox"/> Utilities and bills (email/post)<input type="checkbox"/> Login details and passwords<input type="checkbox"/> Assets and liabilities<input type="checkbox"/> Location of safety deposit box, storage unit and safe<input type="checkbox"/> Location of important documents

Ease of administration	Gather important documents
<ul style="list-style-type: none"> <input type="checkbox"/> Roll of superannuation into a single account (consider life insurance implications) <input type="checkbox"/> Close bank accounts that are not needed <input type="checkbox"/> List the preferred distribution of personal items not addressed in a will <input type="checkbox"/> Make gifts of items prior to passing (consider tax implications) <input type="checkbox"/> Write down how to handle email, social media, and online storage accounts 	<ul style="list-style-type: none"> <input type="checkbox"/> Superannuation statements <input type="checkbox"/> Life insurance policies <input type="checkbox"/> Bank statements <input type="checkbox"/> Asset purchase documents for capital gains tax purposes <input type="checkbox"/> Leases/retirement home or residential care contracts <input type="checkbox"/> Loan documents <input type="checkbox"/> Birth certificate <input type="checkbox"/> Marriage certificate (if applicable) <input type="checkbox"/> Passport
Funeral and burial planning	Personal arrangements
<ul style="list-style-type: none"> <input type="checkbox"/> Funeral insurance or prepaid funeral plan <input type="checkbox"/> Contact of spiritual advisor <input type="checkbox"/> Express preferences for burial or cremation, funeral service, charity in lieu of flowers <input type="checkbox"/> Pallbearers <input type="checkbox"/> Eulogy, music, and/or readings <input type="checkbox"/> Where to place remains <input type="checkbox"/> List of guests to be invited <input type="checkbox"/> Memorials 	<ul style="list-style-type: none"> <input type="checkbox"/> Care of children <input type="checkbox"/> Care of pets <input type="checkbox"/> Stored reproductive material (from IVF or fertility treatment) <input type="checkbox"/> Letters to persons of significance/video legacies

End-of-life preferences

- ☐ Who should be present
- ☐ Location
- ☐ Persons to be notified of death
- ☐ Other preferences

Additional notes