



EOL BASICS CHECKLIST

End-of-life planning can feel like an amorphous task. We created this checklist to give you a big picture view of what you need to get your EOL ducks in a row. This isn't a fully comprehensive list, but will give you a great foundation for having your wishes outlined.

The checklists here on page 1 delineate different documents under each category. We recommend you keep these documents together in a physical file box, and even better to keep digital copies together on your desktop for easy access.

LEGAL DOCUMENTS

- Last Will and Trust*
- Revocable Living Trust*
- Domestic Partnership Agreement*
- Durable Financial Power of Attorney*
- Compile: Marriage and death certificates
- Compile: Name change + ID information

**requires legal services and/or notarized copies*

END-OF-LIFE CARE

- Medical directives completed
- Funeral: Traditional, Home Funeral
- Religious affiliation or requests?
- Disposition Instructions: Cemetery burial (include plot info); Cremation (urn? interment?); Green burial; Aquamation
- Housing: Nursing Home or Skilled Facility; In-home care requests

MEDICAL DIRECTIVES

- DNR and POLST (Do Not Resuscitate)
- Living Will/Medical Advance Directive (is it filed at your preferred hospital?)*
- Health care proxy / power of attorney*
- Organ or tissue donor status

**may require legal services and/or notarized copies*

PET(S): LIST OF NEEDS BY PET

- Full Name + Birthdate/Adoption Info
- Veterinarian Name + Contact Info
- Special care needs
- Preferred carer, new home, or shelter
- Pet EOL wishes (comfort care, cremation)

These instructions should include both what happens when you outlive a pet and what happens when your pet outlives you.



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The checklists here on page 2 (labeled “list”) delineate subcategories of helpful lists. We recommend making one Word doc with each of these four lists as a new section. Saving it directly to your desktop makes it easy for others to find, bonus points for emailing it to those who need to be in the know. When in doubt, err on the side of too much info.

LIST OF CONTACTS/IMPORTANT INFO

- Your full name + Birthdate + Social Security #
- Family: Members + Contact Info + Birthdates (helpful: social security #'s)
- Work: Boss, HR, Clients, Customers
- Money: Financial Advisor, Tax Preparer, Debtors
- Legal: Attorney, Power of Attorney
- Medical: Primary Care, Full Care team
- Care: Hairdresser, Wellness Practitioners
- School: Institution, Teachers, Advisor
- Religion/Spirituality: Organization Name
- Life: Communities or other groups, Closest Friends + Contact Info

LIST OF ONLINE + DIGITAL ASSETS

- Passwords/Logins (pw manager, spreadsheet)
- Social Media Accounts
- Website (Hosting and domains)
- Resale Shops (i.e. eBay, Poshmark, RealReal)
- Email accounts + logins
- Google Drive, Dropbox, iCloud, cloud storage
- Photo storage (accounts + external drives)
- Subscriptions and Memberships
- Mileage + Travel accounts / points

LIST OF INSURANCE POLICIES

- Life insurance
- Car insurance
- Renter's / Homeowner's insurance
- Business insurance
- Other insurance policies

LIST OF ASSETS

- Real Estate Debts + Income: Mortgages, Schedule K's, Rentals
- Real Estate: Landlord/Rental Company
- Banking: Credit cards, Pension/401(k), crypto, Accounts: savings / checking / investment
- Cars / Vehicles / Boats
- Possessions: Family heirlooms + Important Mementos