

Future Planning Checklist

Health and lifestyle can change with little or no warning. This checklist can help you think about what it will take to maintain your quality of life. Those who care for you will appreciate your efforts to plan ahead. You will be glad you did.

- Think about the level of personal care you need and expect.
- Share your thoughts with trusted family and friends.
- Explore the cost of care in your home or a nearby facility.
- Have a back-up plan for others to manage your home, care for pets, and access funds for your support.
- Put records, notes, and written plans in a secure place. Tell only those you trust where they are kept.

Financial

- Financial Power of Attorney (FPOA)
(Representative to manage one's finances in the event one is unable)
- Bank account statements (Joint account vs. Transfer on Death designation)
- Retirement account statements (Pension, 401K, IRA, etc.)
- Tax returns
- Social Security / Disability income statements
- Stocks, bonds, certificates of deposit, brokerage account statements
- Loans, debts, credit card statements
- Deeds, mortgage papers
- Vehicle title(s)
- Life insurance policies
- Veteran benefits
- Partnership and corporate operating agreements
- Trust documents
- List of current bills and account numbers
- Passwords for online accounts



Healthcare

- Power of Attorney for Healthcare (POAHC)/Advance Directive/Guardianship (Representative to make medical decisions on one's behalf if incapable)
- Authorization to release healthcare information
- Name(s) of current doctors, specialists
- Health insurance policy and statement
- Insurance card(s) – Medicare, Medicaid, other
- List of current medicines (prescribed and over-the-counter)
- Health history
- Long-term care insurance policy and statements
- Passwords for online accounts

Estate Planning

- Will
- Trust
- Life insurance policy or policies
 - Location of document(s)
- Passwords for online accounts
- Safety deposit box information
- Burial or cremation
- Funeral or memorial arrangements

