Future Planning Checklist Supplement

- Complete a back-up plan for others to manage your home, care for pets, and access funds for your support.
- Put records, notes, online passwords and written plans in a secure place. Tell only those you trust where they are kept.
  - Secure place could include a safety deposit box or a fire safe
  - Provide copies of documents to your trusted family, friend or representative
  - Complete “Personal Document Records” form (provides all information in one document)

Financial

Financial Power of Attorney (FPOA)
- FPOA allows a trusted representative to manage an individual’s finances in the event the individual becomes incapacitated and is unable to make those decisions. Upon death, the FPOA expires.
- Individuals signing this document provides immediate access to one’s financial accounts.
- If concerned with representative having immediate access to financial accounts, inquire about adding a statement that the FPOA only becomes effective under certain circumstances such as “Power of Attorney for Healthcare must first be activated.”
- Links to FPOA
  - Wisconsin FPOA
  - MN FPOA
  - Iowa FPOA

Bank accounts
- Determine best type of account
- Joint account – shared by two or more individuals

Payable on Death designation – transfers to beneficiary upon death
- Copy of statements
- If online, passwords for each
Retirement accounts
- Copy of statements for Pension, 401K, IRA, etc.
- If online, passwords for each

Monthly expenses
- Includes cable, cell phone, internet, heat, electricity, mortgage, etc.
- Copy of each current bill
- If online, passwords for each

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**Healthcare**

Power of Attorney for Healthcare (POAHC)/Advance Directive/Guardianship
- Representative to make medical decisions on one’s behalf if incapable
- [Honinging Choices](#) (Gundersen)
- [Advance Care Planning](#) (Mayo)
- [WI Power of Attorney for Health Care](#)
- [MN Power of Attorney for Health Care](#)
- [IA Power of Attorney for Health Care](#)

Authorization to release healthcare information
- Form available at health care provider

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
- [Sample](#) medication log
- [Blank](#) medication log

Health history
Long-term care insurance
- Copy of policy
- Copy of recent statements
- If online, password
Estate Planning

Estate planning is preparing for the transfer of a person's wealth/debt and assets after his or her death. Assets include items such as a home, real estate, vehicles, personal belongings, heirlooms, etc.

Will
- An individual’s wishes for disposal of property and assets after death
- An executor is assigned to carry out the will after death

Trust
- Becomes effective upon signing and transfer of assets to trust
- Trustee oversees the management of the trust

Life insurance policy or policies
- Copy of policy
- Copy of recent statements
- If online, password

Arrangements after passing
- Burial or cremation
- Funeral or memorial arrangements
- Cemetery plot or Columbarium

Further Information

Consortium
Before the After

Developed by the La Crosse Medical Health Science Consortium’s Transitions in Care and Public Awareness Committee 6-2023