

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 other 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

Healthcare

Power of Attorney for Healthcare (POAHC)/Advance Directive

- Representative to make medical decisions on one's behalf if incapable
- [Honoring 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](#)



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