

Pre-planning Checklist and Instructions

- I have prepared a "Will." My family has a copy and knows the location of the original.
- I have prepared a "Living Trust". My successor trustee has a copy and knows the location of the originals.
- I have discussed funeral arrangements with my family.
- In the event of my death, my family knows where I keep all legal papers and financial records.
- (For couples)* My spouse has access to immediate finances in the event I should die suddenly or am incapable of handling personal finances.
- (For those with minor children or other dependents)* I have made arrangements for guardianship(s).
- I have an attorney, _____ at _____ Law Firm, who has worked through any specific legal situations my estate might create.
- I have made financial arrangements to cover funeral/death expenses.
- I have made a "Power of Attorney" and delivered a copy of it to the person whom I have appointed as my attorney in fact.
- I have made a "Living Will" and discussed it with my family.
- I have made a "Durable Power of Attorney for Health Care Decisions" and delivered a copy of it to the person whom I have appointed as my attorney in fact.
- I have no "Living Will" or "Durable Power of Attorney for Health Care Decisions" but my family and I have discussed what should be done about extraordinary measures if I am taken seriously ill.
- I have made out an organ donor card and/or discussed the issue of organ donors with my family.
- I have discussed any questions I may have about death with my pastor.