



Are You Prepared for Death? Check List

Death and dying are difficult topics to discuss and contemplate. However, with planning this process can be made less challenging. This checklist is a start for planning and a guide for what items you will want to consider or what you need to do in the event someone has died. You can use this checklist before or after a death. Remember, it's not IF it's WHEN. Let's get started with what to do and where to begin.

1. Take time to review this checklist and pick a place to begin. It can be overwhelming to do this all at one time. Just start and do ONE thing. Do what you can. Make a plan to come back to do more and set a date for completion.
2. Determine how you want to store this information: You will be storing documents, check list, copies of documents, and notes. Ideas: Digital, notebook, folder, and files. Whatever works best for you.
3. For documents some things to note: where is original, what is the account/policy number, what is the contact information, who knows where and about this information?

Important Documents and Information to Gather and Locate

Estate Documents

- Legal will or Trust
- Durable Power of Attorney

Medical & Legal Documents

- Advanced Directives / Living will
- Health care directive
- Healthcare Power of Attorney
- DNR (Do Not Resuscitate)
- Long Term Health Care Insurance
- Medicaid/Medicare information
- Healthcare Providers
- Health Insurance Provider and Benefits

Financial Documents (banking, investment, etc.)

- Beneficiary forms up to date
- Bank accounts & financial institutions
- Investments - brokerage, mutual funds, 401K
- Stocks & bond certificates
- Life insurance
- Retirement funds – IRA, pension
- Business information
- Latest Tax return



Are You Prepared for Death? Check List

Other Documents

- Drivers License
- Deeds
- Marriage, divorce or prenuptial papers, decrees
- Military discharge papers
- Passport
- Title documents (vehicles, home, property, etc.)

Planning Topics

- Legacy planning
- Transition planning
- End of life planning
- Personal wishes to share with family
- Funeral/memorial plans

After a Death – What’s Next?

After Death Who to Contact

- Attorney, accountant, and executor of estate
- Employer / pension
- Social security
- VA Benefits
- Life insurance companies - know policy number.
- Credit card companies – FYI- they may close account when notified of death. Pay off balance
- Utilities
- Home /yard / Pet Care
- Subscriptions - magazines, newspaper, services
- Mail - forward mail

After death and memorial service – What’s next?

- Consider specific grief counseling, therapy, spiritual, or coaching guidance
- Made Dr. appointment for self
- Begin self-care and taking care of yourself
- Inventory personal belongings
- Distribute personal belongings - keep, family, friends, donate or sell
- What is your “new normal” life? How has your life changed?
- What is your plan for the future?

Take time to celebrate when you’ve completed this guide. Share this guide with trusted people like your executor and attorney. If you would like assistance or need support I’d be honored to partner with you. Contact me at <http://www.boldfulfilledlifecoach.com>