CareCompany®

END-OF-LIFE PLANNING Checklist

This checklist is designed to help you create a comprehensive end-of-life folder for yourself or an Elderly loved one. Use the open rows to include anything relevant to your specific wishes and circumstances.

№	DOCUMENTS	✓
1	Personal documents: include personal identification documents such as birth certificates, marriage certificates, and other relevant documentation.	
2	Will & Testament: include a copy of your updated will. Consult with a trusted attorney to create your will and keep it up-to-date.	
3	Life Insurance policies: Provide details of any life insurance policies you hold, including policy numbers, coverage amounts, and contact information for the insurance company.	
4	Pension and Retirement plans: Provide information about any pension plans or retirement accounts you have, including contact information for the administrators and beneficiaries.	
5	Financial accounts: Compile a list of all your bank accounts, investment accounts, retirement accounts, and any other financial holdings. Include relevant details such as account numbers, institutions, and login credentials if necessary.	
6	Real Estate documents: Include deeds and bond documents for properties you own, along with contact information for real estate agents, attorneys, or property managers involved.	
7	Vehicle Titles and registration: Include copies of your vehicle titles, registration documents, and any loan information related to your automobiles.	
8	Health and medical information: Include a summary of your medical history, any chronic conditions, and a list of medications you take. Provide contact information for your healthcare providers, including primary care physicians and specialists.	
9	Advanced healthcare directives: Include any advance directives you have prepared, such as a living will, power of attorney for healthcare, or do-not-resuscitate (DNR) orders. Make sure your designated healthcare proxy or agent has a copy.	
10	Funeral preferences: include any instructions or preferences you have for your funeral or memorial service, burial or cremation arrangements, and any funeral plans.	

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11	Daily living assistance: if you receive assistance for daily living activities, include details of caregivers, home care agencies, or assisted living facilities involved. Include contact information and any relevant care instructions.	
12	Support services: include information about any support services or organisations that you use, such as meal delivery programs, transportation services, or social support/church groups.	
13	Digital assets: provide instructions for accessing your digital assets such as email accounts, social media profiles, online storage, and cryptocurrency wallets. Include relevant usernames, passwords, and two-factor authentication information if applicable. Don't forget to make a note of how digital accounts should be close or managed.	
14	Contact list: Create a list of key contacts who should be notified in the event of your passing. Include family members, close friends, church groups or social organisations, attorneys, financial advisors, healthcare providers, home care agencies, and any other professionals involved in your care.	
15	Power of attorney (POA): It's important to note that a POA document grants someone the authority to act on your behalf during your lifetime if you become incapacitated, whereas an "in case of death" folder typically focuses on matters after your passing. It is still relevant to have a copy of your power of attorney document easily accessible in your folder in case it's needed for reference or if your designated agent needs to handle any remaining affairs. When including a POA document in your folder, ensure that it clearly identifies your appointed agent(s) and outlines the specific powers granted to them. Make sure to keep the document updated if there are any changes in agents or if you wish to modify the powers granted.	
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