

SECURE

SHARE

WRITE



COMPLETE END-OF-LIFE PLANNING CHECKLIST

A comprehensive guide to organizing what your loved ones will one day need. Clarity today prevents confusion tomorrow.



Quick Assessment

Reality Check

If something happened tomorrow:

- ☐ My loved ones would know where everything is
- ☐ Access instructions are documented securely
- ☐ My wishes are written down
- ☐ The right people have been informed

If you hesitated on any of these, your plan may not be complete.



A Thoughtful Plan, Fully Documented

Move through each category to capture the practical and personal details that bring true peace of mind.

Legal & Core Documents

- ☐ Birth certificates
- ☐ Social security card
- ☐ Driver's license / ID / Passport
- ☐ Last Will & Testament
- ☐ Trust documents (revocable/irrevocable)
- ☐ Power of attorney
- ☐ Healthcare directive or living will
- ☐ HIPAA authorization
- ☐ Guardianship designations
- ☐ Marriage or divorce certificates

Financial Accounts

- ☐ Bank accounts
- ☐ Retirement accounts
- ☐ Investment accounts
- ☐ Life insurance policies
- ☐ Stocks
- ☐ Student loans
- ☐ Mortgage information
- ☐ Credit cards
- ☐ Outstanding debts
- ☐ Tax returns (last 3 years)
- ☐ Business ownership documents

Digital Life & Access

- ☐ Email accounts
- ☐ Social media profiles
- ☐ Cloud storage
- ☐ Online subscriptions
- ☐ Crypto wallets
- ☐ Password manager
- ☐ Two-factor authentication backup codes
- ☐ Domain names or online businesses

Personal Wishes

- ☐ Funeral or memorial preferences
- ☐ Burial or cremation instructions
- ☐ Cemetery plot
- ☐ Prepaid funeral expenses
- ☐ Music or readings
- ☐ Charitable donations
- ☐ Obituary preferences
- ☐ Legacy letter or personal message

Home & Practical Details

- ☐ Location of important documents
- ☐ Safe combinations / Security systems
- ☐ Utility providers
- ☐ Property deeds
- ☐ Vehicle titles and insurance
- ☐ Storage units
- ☐ Pet care instructions
- ☐ Emergency contacts
- ☐ HOA expenses
- ☐ Home owner's insurance

Medical & Health

- ☐ Primary care doctor and key specialists
- ☐ Current medications and dosages
- ☐ Health conditions and medical history
- ☐ Organ donation preferences
- ☐ Allergies
- ☐ Blood type
- ☐ Do-not-resuscitate order (DNR)

People & Access

- ☐ Executor
- ☐ Trustee
- ☐ Power of attorney
- ☐ Healthcare proxy
- ☐ Trusted digital access person
- ☐ Primary family contact
- ☐ Guardianships

Subscriptions

- ☐ Streaming services (Netflix, Hulu, Spotify, Apple)
- ☐ Gym memberships
- ☐ Subscription boxes (Book of Month, Wine Club)
- ☐ Meal kits (Blue Apron, Home Chef)
- ☐ Warehouse memberships (Costco, Sam's Club)
- ☐ Lawn care / snow removal / pool services
- ☐ Amazon Prime
- ☐ Recurring deliveries (Chewy, diapers, Rx refills)



Organize It Once. Access It When It Matters.

A checklist is the first step. Peace of mind comes from storing everything securely in one place and assigning trusted access before it is needed.

START YOUR SECURE PLAN