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Reasons to Have a Checklist



1. Acquaint yourself with the decisions that need to be made in regards to the management of your life, estate, all legal issues, personal considerations and death.
2. Leave nothing out. Do not assume someone else will take care of your check list.
3. Review your list periodically. Depending on your state of health and that of others, be sure you have updated and kept everything current on it.
4. If you need help, as will be likely, see out the assistance of others who can contribute to your completing a thorough and well thought out list.
5. Have you list reviewed by a third party, an attorney, a trusted confident, a person with enough objectivity to point out omissions or inclusions that should be considered.
6. Put your list in a safe place and have extra copies available to those who may need to have access to it.
7. Schedule a time on your calendar (every other year, every five years, whatever you feel is prudent) to review the contents and intent of your list. Plan to do this with someone with whom you are comfortable.
8. Make yourself comfortable with the idea of making necessary changes prompted by circumstances and influences since the list was reviewed last.
9. Correct the list and return it to its safe keeping place, along with necessary copies to designate others.
10. Keep the contents appropriately confidential, not involving persons who may have issues with your choices and decisions. If that prospect is a possibility, be sure an attorney or other referee is apprised of his or her role when the time comes.

It is your list. Make it and keep it current. Do not procrastinate. Everyone needs a life plan checklist.

Important information to have ready.

Doctor Information: Names, specialties and phone numbers.

Medications: List of all medications being taken and what the prescriptions are for (keep this information updated since medications can change frequently) and which pharmacy you use.

Medical Insurance and Prescription Plans: Include identification numbers and the name of any long-term care or cancer policies with contract numbers and phone numbers.

Social Security Number: Many insurance companies will not talk to anyone without the patient's number.

Durable Power of Attorney: A legal document that gives someone the authority to handle legal and financial issues if you, your parent or elderly relative becomes incapacitated.

Health Care Proxy: A legal document that gives someone the authority to make medical decisions for you, your parent or elderly relative. Specify your wishes about resuscitation orders. Knowing this information before a crisis can be crucial.

Trust or Will & Life Insurance: Make sure your family or friends know where you keep this information.

Basic Financial Records: A list of assets, account numbers, names and contact information for financial advisors or bank representatives, savings bonds, stock certificates etc.

Monthly Bills: Expenses and income, property taxes (when those are paid and how much), credit cards, quarterly taxes etc.

Local Clergy: List the name and contact information if you have a preferred clergy member or religious affiliation.

Passwords: Combinations or codes to computers, safes, home security systems etc.

Bank Safes & Security Boxes: List which bank, where it is located and where the extra keys are located.

Valuables: Include where you keep your jewelry, artwork, stamps, coin collections, guns etc.

Yard & Snow Removal Services: List which companies handle your estate and how often they provide service.

Allergies: Make a list of any food or medication allergies.

Funeral Arrangements: Make sure final wishes are carried out for your memorial, funeral service, burial or cremation.

Important Disclosure Information

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