

# END-OF-LIFE PLANNING CHECKLIST & FORMS

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## 1. Essential Paperwork to Gather in One Place

- Birth certificate
- Social Security card
- Passport
- Marriage license / divorce papers
- Military service record (if applicable)
- Will and/or trust documents
- Power of attorney (financial and medical)
- Health care directive / living will
- Insurance policies (life, health, long-term care)
- Property deeds, titles, and mortgages
- Banking and investment account information
- Contact list of lawyer, financial advisor, executor, and pastor

## 2. Personal Legacy & Remembrance

How I'd like to be remembered (values, stories, what matters most to me);

Accomplishments I'm grateful for/proud of; Important relationships and people I want acknowledged.

### **3. Obituary Information**

Full name, nickname(s), date/place of birth; Parents' names, siblings, spouse, children, grandchildren; Education; Career highlights; Church/community involvement; Hobbies and passions; Any quotes, sayings, or scriptures that defined my life.

### **4. Funeral / Memorial Service Planning Form**

Preferred Bible verses; Other readings/poems; Hymns or songs I'd like included; Special requests (soloist, choir, instruments); Type of service (church, graveside, memorial, celebration of life); Pastor/clergy requested; Visitation/wake preferences; Burial, cremation, or other wishes; Instead of flowers, donations to \_\_\_\_\_.

### **5. Practical & Digital Information**

Where I keep my keys; Password manager/written password list location; Main contacts (friends, family, lawyer, pastor, etc.); Pet information (names, vet, care instructions); Security questions / where record is kept; Electronic devices (phone, laptop, tablet) and how to access them; Social media login info or where it's stored; Bank accounts (institution names only); Credit card companies (institution names); People to notify upon my passing.