

Checklist: How-to Write Your EOL Plan: 3 Steps

Preparation

- | Learn about final care, asset distribution and final arrangement options
- | Make final decisions, identify your Healthcare Proxy and name beneficiaries

Step 1: Complete Your Advance Healthcare Directive

- | Find the correct AHD form for your state
- | Identify the care you want if you become unable to make decisions
- | Appoint a Healthcare Proxy to make medical decisions if you are unable
- | Complete, sign and date the AHD with witnesses and/or a notary public as required
- | Revisit and revise your AHD if your health changes

Step 2: Write Your Will

- | Find the correct Last Will & Testament form for your state or a will template
- | Identify and inventory your assets; include financial, personal and digital assets
- | Appoint an Executor to administer your estate; appoint a Digital Executor to manage your online accounts and digital content
- | Name beneficiaries whom you want to inherit your assets

| Sign and date the will before witnesses and/or a notary public; consult an attorney if you need help

| Make copies for your Executor, other advisors and yourself

| Revisit your will to make changes or revoke or amend it

Step 3: Plan Your Funeral

| Choose your ceremony and/or service options

| Select personalized products, including music, food, flowers, technology and other personal touches you want

| Decide your final resting place

| Review financial benefits under your funeral insurance policy, trust or federal insurance plan

| Complete our Funeral Planning Checklist

| Include your final service wishes in your will or estate plan

For additional help creating your EOL plan, read the “Basic End of Life Resource List” in this eBook. Visit www.passare.com for more information and expert resources from Passare that can help simplify end of life management.



Learn more at www.passare.com