



# Planning Ahead Checklist

Not sure where to start with your planning? Start right here.

Planning for end-of-life is an empowering undertaking. It will ensure your final wishes are honored, and also provides you with peace of mind. Planning ahead saves your loved ones from having to make difficult decisions during an emotional time.

We offer this checklist to simplify the process and to help you keep track of what to consider.

Planning for end-of-life can seem overwhelming at first but taking things one step at a time can make things so much more manageable. **Keep in mind that every guide doesn't have to be completed at once, and not every guide may apply to what you need right now.** Every person's needs are unique, and it's a journey - not a sprint.

The first step in being prepared for anything is to review the list below to help you get started on your planning journey. You can check things off as you go:

- STEP 1: Review the Planning Ahead Checklist
- STEP 2: Complete the Guides that make sense to you:
  - Important Decisions Guide
  - Get Organized Guide
  - Last Impressions Guide
  - Final Ceremony Guide
- STEP 3:
  - Store Your Plan, using the tips below
  - Share Your Plan
    - You can use the Share Your Plan – Conversation Helpers Tool – a great list of tips to help you prepare for this discussion.
  - Keeping Your Plan Current, using the tips and commitment below

## Tips on storing your plans in a safe yet accessible place:

- Keep your important documents, guides, checklists, and plans all in one safe and secure place. You have 2 options for storage:
  - Physical Storage Location:

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- Can be a locked filing cabinet or safe. Consider making it fire and moisture proof for extra protection. You can also store them with
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your attorney. It's recommended that if you store on paper, you make copies and store them in a second location as back-up.

□ Digital Storage location:

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- Digital copies can be scanned, photographs, or digital documents. You can choose to use free or paid services to save documents online, like Google Drive or Microsoft One Drive.
  - Most importantly, make sure your loved ones know how to access these files when needed
  - You can also make copies of your plans and share them directly with a trusted loved one

### Tips on keeping your plans current:

The great thing about life is that things can change. New people enter your life, old ones leave, and circumstances will change. It's beautiful! But that means you should be revisiting your plans and decisions regularly to make sure they are up-to-date and accurate.

- It's best to review your plans every 1-2 years and at the very least every 5 years
- Combine revisiting your plan with another regular event – like your mortgage renewal or car registration, so it's easier to remember and becomes part of another routine event
- Remember that certain life events or big changes should also trigger a review, including:
  - Birth or death in the family
  - Marriage, divorce or change in committed relationships
  - New home
  - Retirement
  - Inheritance, sudden financial windfall or financial setbacks
  - Legal or tax changes
  - Health diagnosis
  - New outlook

### My commitment to me:

For my end-of-life plans, I commit to reviewing my plan every \_\_\_\_\_ years.

I commit to reviewing my plan every time I review/renew my: \_\_\_\_\_



## Congratulations!

Pat yourself on the back! We are proud of you for getting started. Now you know what's ahead of you.

Don't forget to store this completed checklist safely and securely, where loved ones could access it when needed.