

Planning Checklist

This form is a self-assessment, intended to assist you in planning and setting priorities.

1. Have I made arrangements that would reflect my wishes in the event of my death or disability?

- If I should die or become disabled, would those close to me have reasonable financial security?
- Have I made arrangements for care of my dependents, and those who are emotionally dependent on me?
- Do I have a legal will, which has been drawn up in proper legal form and reflects what I really want as of today?
- Do I have a durable power of attorney, which has been drawn up in proper legal form and reflects what I really want as of today?
- Do I have a healthcare power of attorney, which has been drawn up in proper legal form and reflects what I really want as of today?
- Have I made out a Living Will, which has been drawn up in proper legal form for North Carolina and reflects what I really want as of today?

2. Have I communicated my wishes, and the arrangements that I have made, to those close to me?

- Would those closest to me know who is named as my power of attorney, and what my wishes would be in the event of disability?
- If I should die or become disabled, would those close to me know my wishes for disposal of my body?
- Have I discussed my financial circumstances with those close to me?
- Could my friends and family easily contact those I would want notified of my death?

3. Do those close to me know where to find important documents such as*:

- My durable power of attorney?
- My healthcare power of attorney?
- My living will?
- My will?
- The name and address of the lawyer who drew it up?
- The list of all securities owned and information on the cost of acquiring them?
- All life insurance policies, credit card insurance and mortgage insurance?
- All medical expense, hospitalization, and accident policies?
- Information on all death benefits, such as those provided by the company by which I was employed, or by the VA, Social Security, or union?
- Bank books, checking accounts, and savings certificates? (A spouse now has access to a joint checking account without interruption.)
- Deeds for property owned and records of payment for property?
- Mortgage statements and other evidence of payment for the property?
- All unpaid bills?
- All records needed to calculate federal income tax, state, and local taxes and other taxes owed?
- Income tax records for several previous years?
- Passwords to electronic records and accounts

** The "Personal Inventory" form provides one structure for recording this information.*