

Brief Planning Checklist

1. _____ I have a Durable Power of Attorney for property matters.
2. _____ I have determined that a Trust arrangement . . .
_____ is useful in my situation.
_____ is not useful in my situation.
_____ I don't know.
3. _____ I have a Health Care Advance Directive:
_____ Comprehensive (proxy and instructions).
_____ Health Care Power of Attorney only (proxy).
_____ Living Will only (instructions).
4. _____ I have a Will (for disposition of my estate after death).
5. _____ I have chosen a trustworthy person (or persons) to be my agent under a Durable Power of Attorney for property.
_____ I have fully discussed my finances and plans with this person.
6. _____ I have chosen a trustworthy person (or persons) to be my agent (proxy) under a Health Care Power of Attorney.
_____ I have fully discussed my health care expectations and wishes with this person.
7. _____ I have talked to my physicians about my wishes in case of serious illness and given him/her a copy of my Health Care Advance Directive to enter into my medical record.
8. _____ I have completed the Personal Information Sheet, Funeral Requests Sheet, Notification List, Document Locator Sheet, Insurance/Pension Data Sheet, and if applicable, the Schedule of Assets for Trust.
9. _____ I have my Laminated Notice to Health Care Provider care with my driver's license.