

Document & Preparedness Checklist

Track what you have, what needs work, and where the current version lives

Educational planning resource - not legal, tax, financial, or medical advice. Laws and terminology vary by state. Use this guide to organize your thinking and bring informed questions to qualified professionals.

Last Will and Testament

After-death distribution and executor nomination

Have

Need / create

Needs review

Location / notes

Power of Attorney

Financial/legal authority during life

Have

Need / create

Needs review

Location / notes

Health Care Proxy / Medical POA

Medical decision-maker

Have

Need / create

Needs review

Location / notes

Living Will / Advance Directive

Treatment values and preferences

Have

Need / create

Needs review

Location / notes

HIPAA Authorization

Medical-information access

- Have
- Need / create
- Needs review

Location / notes

Disposition of Remains Appointment

Authority for remains / cremation / burial

- Have
- Need / create
- Needs review

Location / notes

Beneficiary Designations

Retirement, insurance and other designated assets

- Have
- Need / create
- Needs review

Location / notes

Trust documents, if any

Trust ownership / administration

- Have
- Need / create
- Needs review

Location / notes

Personal Continuity Inventory

Accounts, contacts, systems and instructions

- Have
- Need / create
- Needs review

Location / notes

Password Manager Emergency Access

Secure credential continuity

- Have

Need / create

Needs review

Location / notes

Digital / Social Media Instructions

Preserve, memorialize, transfer or delete

Have

Need / create

Needs review

Location / notes

Business Continuity Plan

Keep operating, sell or wind down

Have

Need / create

Needs review

Location / notes

Pet Care Instructions

Immediate and long-term care

Have

Need / create

Needs review

Location / notes

Property / Housing Records

Deed, lease, co-op/HOA, mortgage, insurance

Have

Need / create

Needs review

Location / notes

Tax Records

Returns, basis, business records

Have

Need / create

Needs review

Location / notes

Creative / IP Instructions

Copyrights, royalties, archives, licensing

Have

Need / create

Needs review

Location / notes

Funeral / Memorial Preferences

Practical wishes and contacts

Have

Need / create

Needs review

Location / notes