

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.

Item	Purpose	Have	Need	Review	Location / notes
Last Will and Testament	After-death distribution and executor nomination	☐	☐	☐	
Power of Attorney	Financial/legal authority during life	☐	☐	☐	
Health Care Proxy / Medical POA	Medical decision-maker	☐	☐	☐	
Living Will / Advance Directive	Treatment values and preferences	☐	☐	☐	
HIPAA Authorization	Medical-information access	☐	☐	☐	
Disposition of Remains Appointment	Authority for remains / cremation / burial	☐	☐	☐	
Beneficiary Designations	Retirement, insurance and other designated assets	☐	☐	☐	
Trust documents, if any	Trust ownership / administration	☐	☐	☐	
Personal Continuity Inventory	Accounts, contacts, systems and instructions	☐	☐	☐	
Password Manager Emergency Access	Secure credential continuity	☐	☐	☐	
Digital / Social Media Instructions	Preserve, memorialize, transfer or delete	☐	☐	☐	
Business Continuity Plan	Keep operating, sell or wind down	☐	☐	☐	
Pet Care Instructions	Immediate and long-term care	☐	☐	☐	
Property / Housing Records	Deed, lease, co-op/HOA, mortgage, insurance	☐	☐	☐	
Tax Records	Returns, basis, business records	☐	☐	☐	
Creative / IP Instructions	Copyrights, royalties, archives, licensing	☐	☐	☐	
Funeral / Memorial Preferences	Practical wishes and contacts	☐	☐	☐	