

THINKING AHEAD

CHECKLIST

WEEK 1

Below is a series of checklists broken up by day. Each day focuses on a different topic under the week's theme. Check off each of the tasks as you complete them to monitor your progress. More information about what to do each day is available in your Thinking Ahead emails.

DAY 1 IDENTIFICATION

- Gather the following documents
 - Birth certificate
 - Social Security card
 - Copy of driver's license
 - DD-214 (if you're a veteran)
 - A recent photo of you where you are identifiable
 - Marriage certificate (if applicable)
 - Divorce certificate (if applicable)
 - Prenuptial agreements (if applicable)
 - Divorce settlements (if applicable)
 - Copy of diploma from highest level of education

DAY 2 PROPERTY

- Gather the following documents
 - House deed(s) or lease(s)
 - Other property deeds or leases
 - Vehicle titles
 - Current copies of wills and trusts (if applicable)
- Write out instructions for care of any pets
- List all physical subscriptions (newspapers, cable, utilities, etc.)
- List all items that require special care in your will

DAY 3 FINANCES

- Gather information about the following
 - Bank accounts
 - Credit/debit cards
 - Investments (including stocks, businesses, etc.)

DAY 3 FINANCES (CONTINUED)

- Pension plans
- Retirement funds
- Other government or employer benefits (including 401k)
- List any debts, loans, or mortgages you have
- List the locations of safety deposit boxes and other caches
- Gather copies of recent tax returns

DAY 4 HEALTH

- List any prescriptions you take and where you keep them
- List any health conditions that your loved ones may not know about
- List any pacemakers, gold teeth, or other implants that you have
- List all doctors you have and their contact information

DAY 5 INSURANCE

- Gather information about the following
 - Life insurance
 - Home insurance
 - Vehicle insurance
 - Long-term care insurance
 - Funeral insurance

DAY 6 END-OF-LIFE CARE

- Write down your answers to the following questions
 - Would you rather live with loved ones, in a nursing home, or elsewhere?
 - If you must stay in a hospital or hospice, where would you stay?
 - What is the minimum you must be able to do to live a meaningful life?
 - What kind of live-saving care would you NOT want?

DAY 7 DIGITAL ESTATE

- Set up auto-deletion on Google accounts
- List the following
 - Email accounts
 - Social media profiles
 - Online shopping sites you use frequently
 - Websites you own
 - Digital subscriptions (Netflix, gaming, etc.)