

THINKING AHEAD CHECKLIST

WEEK 3

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 15 THE WILL

- Name guardians for minor children
- Name new caretakers for pets
- Name beneficiaries for any account that you don't want going through probate
- Ensure all real estate and prized possessions are inherited by the correct people
- Coordinate with a spouse through the drafting of a will - some decisions may even require their permission

DAY 16 TRUSTS

- Decide with your trust and estate attorney what assets, if any, need to be secured in a trust

DAY 17 POWER OF ATTORNEY

- Complete the financial and legal power of attorney form for your state

DAY 18 ADVANCE DIRECTIVE

- Decide if you want to be an organ donor
 - If so, complete the required forms for your state with your doctor
- Decide if you wish to sign a DNR
 - If so, complete the required forms for your state with your doctor
- Talk to your doctor and estate attorney about completing a living will
- Ensure your healthcare proxy knows your wishes

DAY 19 DISPOSITION

- Think about how you want to be cared for after you pass away (See Week 4)
- Choose a funeral home or cremation provider that can carry out your wishes
- Preplan a service
- Write down contact information

DAY 20 BENEFITS

- If you're a veteran, record what benefits are available to you
- Talk with your financial planner about what employer benefits you may have
- Talk to your insurance agent about what kind of insurance you may need

DAY 21 RELIGION

- Speak to a religious leader about your plans (if applicable)