



PREPARING FOR DEATH CHECKLIST

- Execute and update will, trusts, living will, durable power of attorney, and related estate planning documents. Keep these in a safe and accessible place known to family members.

- Prepare instructions to your executor explaining the location of all assets, personal records, tax returns, bank statements, investment accounts, homeowners and automobile insurance policies, etc. Note the combination to any safe on instructions to executor, and location of any safe deposit box.

- Evaluate and provide for sufficient continuing income for surviving dependents.

- Estimate cost of and arrange for adequate funds to pay probate expenses, debts, and death taxes and related costs.

- Your will should make specific bequests of each item of personal property (e.g., family heirlooms) that are earmarked for particular individuals.

- Consider preplanning and prepaying for burial and funeral arrangements. Notify family and/or friends of the arrangement.

- Consider with your estate planning advisers a regular program of gifts to family and/or friends to take advantage of the gift tax annual exclusion.

- Assure that the home to be occupied by your survivors is safe, and is adequately repaired and maintained.

- Notify family members of matters for which they must assume responsibility after your death.

- If desired, compile personal information needed for obituary.

- If desired, compile instructions on desired funeral and memorial services. Indicate where services should be conducted, who should conduct services and what should be included in the service. For example, favorite songs or poems may be listed.

- If desired, compile instructions on where to be buried. Inform family or friends of veteran status, and any desire to be buried in a national cemetery.

- If desired, compile names and contact information of all individuals (personal or professional) that should be notified of your death.

- If desired, make appropriate arrangements and notify family and/or physician of desire to serve as an organ donor.

- Examine how property is titled and make modifications as needed.

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