



Future Planning Checklist

Use this checklist to help you stay organized and take action on key steps in planning for your future. Print it out or save it to revisit over time.

☒ Estate & Legal Planning

- ☐ Create or update a will
- ☐ Establish a living trust (if applicable)
- ☐ Set up a Medical Power of Attorney
- ☐ Set up a Financial Power of Attorney
- ☐ Draft an Advance Healthcare Directive (Living Will)
- ☐ Decide on DNR and organ donation preferences
- ☐ Store legal documents in a secure, accessible place
- ☐ Inform your trusted person(s) where documents are stored

☒ Financial Preparation

- ☐ Meet with a Certified Financial Planner (CFP)
- ☐ Review retirement savings and investments
- ☐ Create or update a monthly budget
- ☐ Evaluate life insurance coverage
- ☐ Explore long-term care insurance options
- ☐ Consolidate and organize banking and account info

☒ Health & Medical Planning

- ☐ Compile a list of current medications and medical conditions
- ☐ Keep health insurance and long-term care policy details accessible
- ☐ Choose a primary decision-maker for medical emergencies
- ☐ Organize a list of doctors and emergency contacts

☒ End-of-Life & Funeral Planning

- ☐ Document funeral or memorial preferences
- ☐ Decide on burial or cremation
- ☐ Consider prepaying or setting aside funds for arrangements
- ☐ Write down service ideas (music, readings, speakers)
- ☐ Share preferences with family or executor

☒ Document Organization

- ☐ Gather birth certificate, Social Security card, and passport
- ☐ Compile insurance policies (health, life, auto, LTC)
- ☐ List all bank, investment, and retirement accounts
- ☐ Store POA, will, trust, and healthcare directives together
- ☐ Maintain a list of logins and passwords (or use a password manager)
- ☐ Create a digital or physical "In Case of Emergency" file

☒ Communication

- ☐ Talk to your medical and financial POA designees
- ☐ Inform family or close friends of your wishes
- ☐ Review plans annually or when life circumstances change

☐ **Tip:** Start with just one section per month—progress over time is still progress.
☒ Consider storing everything in a labeled binder or secure digital folder.