



LAST QUARTER TOOLBOX CHECKLIST

PLANNING AHEAD

- Discuss with your family your needs and expectations if you were to become ill or die.
- What quality of life would you like?
- What legacy would you like to leave?
- Update your beneficiaries for both your personal assets and work-related life insurance policy.
- Does anyone know what your needs are?
- What changes would you need to make now in order to prepare for the life you want during your final years, months, and days?
- Start thinking with your family about resources you can provide outside of financial.
- Do you have international assets? Obtain originals of documentation

THE LITTLE BLACK BOOK

Passwords

- Keep a digital (encrypted) or written book of passwords

Accounts

- Have a list of accounts for utilities, bank accounts, and recurring bills for access for your beneficiaries.

Advice

- Write down or leave a video leaving sound, biblical advice to your loved ones on life, love, tough decisions, and words of wisdom for generations to come.

Documentation

- Health Care Agent, Health Care Proxy Form, Funeral Proxy Form, Will, and Testament

Finances

- Documentation of assets and how to obtain access to them, update beneficiaries and contingents, establish a trust if your children may not be old enough to manage, notate any charitable contributions for church, non-profit, or charity.

LINKS TO HEALTH CARE PROXY FORM AND HEALTH INFORMATION BY STATE

Connecticut

- <https://portal.ct.gov/AG/Health-Issues/Connecticuts-Living-Will-Laws>

Florida

- https://www.fhca.org/consumers/health_care_advanced_directives

Massachusetts

- <http://www.massmed.org/healthcareproxy/#.YFYt3a9KjIU>

New Jersey

- https://www.nj.gov/health/advancedirective/documents/proxy_directive.pdf

New York

- <https://www.health.ny.gov/publications/1430.pdf>

Rhode Island

- <https://health.ri.gov/lifestages/death/about/advancedirectives/>