

# WHAT CAN YOU DO FOR THOSE WHO FOLLOW YOU?

## PRE-ARRANGE YOUR FUNERAL:

It is easier for you to choose a casket and make other important decisions than for your family members to do so after your death.

## WRITE YOUR OWN OBITUARY:

Who would know the details of your life better than you? You might save a great deal of stress on your family members by having this basic information written down. Some funeral homes will help you with this as you pre-arrange your funeral.

## MAKE AN INVENTORY:

Make a list of all important information for your family and/or executor. This would include accounts and where they are located, policies and where they are kept, names of trusted advisors (attorney, financial advisor, tax preparer, etc.), specific matters of information only you might know, etc. Since you have just gone through the loss of a loved one, what information would you wish your loved one had written down for you?

## SIGN A LIVING WILL:

This is your right to give instructions to your doctors in the event of a terminal illness or permanent unconsciousness. This can relieve some of the pressure off of your family members in making tough decisions. Contact your attorney for more information on living wills.

## ESTATE PLAN:

- Make sure your estate planning documents are in order. The Foundation will be happy to help you think through the various issues involved. Your attorney can help you with any changes that you need to make.
- Check your Will and/or Trust—Since your loved one has died, do you need to update your documents? Do you need to add a new backup executor? Do you need to update your beneficiaries?
- If you have a trust, the same issues may apply. Also, it is a good time to verify all your assets except retirement accounts and potentially life insurance that have been titled to the trust name. Your financial advisor or attorney can help you with this.
- Does your durable power of attorney include the appropriate agents? Do you need to name a new backup agent?
- Beneficiary statements—It is important to review each of the beneficiaries listed on your insurance policies, bank accounts, brokerage accounts, and retirement accounts. Do you have the correct beneficiaries listed as well as alternate beneficiaries?

## NOTES:

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