

# Checklist: Diagnosed With A Serious Illness

## Getting Started

Whether it's for yourself or someone you love, use this checklist to help you get some important planning out of the way.

Here are the things we cover:

- Medical Decisions: Advance Directive, DNR, and POLST
- Location of Legal Documents & Official Identification
- Financial & Insurance Info
- Utilities & Digital Accounts
- General Funeral & Legacy Wishes

## Remember

[Create an Everplan](#) to easily and securely update and share this vital info with the people you love and trust.

## ADVANCE DIRECTIVE

Your Advance Directive is comprised of two parts. Your **Living Will** outlines what kind of life-support treatment you *want* or *don't want* at the end of life; your **Health Care Proxy** will be the one to make medical decisions on your behalf should you no longer be able to make them on your own.

I have a completed my state's official Advance Directive form

Living Will

Health Care Proxy

Location of Advance Directive: \_\_\_\_\_

I need to fill out my state's Advance Directive form [[State-by-State Advance Directive Forms](#)]

## DO NOT RESUSCITATE (DNR) ORDER

A **DNR** order is separate from a Living Will -- even if your Living Will states that you do not want life-support treatments. If you'd like to create a DNR, you'll need to meet with your doctor to complete the forms.

I have met with my doctor and obtained an official, completed DNR

Location of DNR: \_\_\_\_\_

I need to meet with my doctor to obtain my DNR

I **don't** want a DNR

## POLST (PHYSICIANS ORDERS FOR LIFE SUSTAINING TREATMENT)

This is a legal document for people with advanced progressive illnesses that specifies the type of care they would like in an emergency medical situation; it also goes by: MOST, MOLST, POST and TPOPP.

Find out if my state offers a POLST or a similar form: [State-By-State POLST Forms](#)

I have met with my doctor and obtained an official, completed POLST form

Location of POLST: \_\_\_\_\_

I need to meet with my doctor to obtain my POLST

I **don't** want a POLST

## LEGAL DOCUMENTS

Will

Executor: \_\_\_\_\_

Official document location: \_\_\_\_\_

Power Of Attorney

Person Named: \_\_\_\_\_

Official document location: \_\_\_\_\_

## IDENTIFICATION / VITAL DOCUMENTS

Share the location of the following forms of ID.

Birth Certificate

Driver's License

Social Security Card

Armed Forces ID / Discharge Papers

Passport

Citizenship Documentation

Marriage Certificate

Divorce Decree / Settlement Info

Other (Example: Club Memberships, State ID card):

\_\_\_\_\_  
\_\_\_\_\_

## FINANCIAL ACCOUNTS

Have a recent account statement for each, location of related items (example: checkbooks, passbooks), and online management info (account/login and password).

Checking

Savings

Credit Cards

Investments

Trusts

Mortgage/Loan Info

Other (Example: Debit Card, Promissory Note):

\_\_\_\_\_  
\_\_\_\_\_

## INSURANCE INFO

Share the location of related items (example: Official policy, ID card), and online management info (account/login and password).

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Life Insurance   | <input type="checkbox"/> Health Insurance     | <input type="checkbox"/> Car Insurance            |
| <input type="checkbox"/> Home Insurance   | <input type="checkbox"/> Renters Insurance    | <input type="checkbox"/> Long-Term Care Insurance |
| <input type="checkbox"/> Funeral Insurance  | <input type="checkbox"/> Disability Insurance | <input type="checkbox"/> Disaster Insurance       |
| <input type="checkbox"/> Other Insurance Policies (Example: Umbrella, Personal Articles): |   |   |
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## HOUSEHOLD UTILITIES

Have a recent account statement for each utility or service as well as contact info if applicable.

- |  |  |
|--|--|
| <input type="checkbox"/> Electricity/Gas/Oil                         | <input type="checkbox"/> Phone/Cable/Internet              |
| <input type="checkbox"/> Garbage                                     | <input type="checkbox"/> Cleaning Service/ Landscaping     |
| <input type="checkbox"/> Home Automation                             | <input type="checkbox"/> Exterminator/Plumber/ Electrician |
| <input type="checkbox"/> Other (Example: Decorator, Pool Cleaner...) |  |
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## DIGITAL ACCOUNTS / SERVICES

Be prepared to identify all of the following digital accounts and services you use (username/password).

- |  |   |
|--|---|
| <input type="checkbox"/> Email                             | <input type="checkbox"/> Social Media                                   |
| <input type="checkbox"/> Shopping                          | <input type="checkbox"/> Entertainment (Video / Music / Gaming)         |
| <input type="checkbox"/> Health / Medical (medication)     | <input type="checkbox"/> Money Management                               |
| <input type="checkbox"/> Cloud Storage (Photos, Documents) | <input type="checkbox"/> Travel / Food / Delivery                       |
| <input type="checkbox"/> Password Manager                  | <input type="checkbox"/> Unlock Codes: Cell Phone/Computer/Tablet       |
| <input type="checkbox"/> Home Wi-Fi/Router                 | <input type="checkbox"/> Other (Example: Photography, Productivity...): |
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## MISCELLANEOUS IMPORTANT INFO

- Dependents (Children, Special Needs)     Magazine/Newspaper Subscriptions
- Pets (Vet, Diet, Guardian, Insurance)     Collectibles (coins, stamps, memorabilia)
- Other:
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## LEGACY / AFTER I'M GONE

Things you should think about even if you haven't done any planning yet.

- Decide among: Burial | Cremation | Donation
- Funeral / Memorial Preferences
- Contracts / Prepaid Arrangements (Example: cemetery plot information)
- Obituary Preferences and info, which typically includes the following:
- Date/place of birth: \_\_\_\_\_
  - Date/place of marriage: \_\_\_\_\_
  - Parent's names: \_\_\_\_\_
  - Education (schools/degrees): \_\_\_\_\_
  - Military/Public service: \_\_\_\_\_
  - Employment (titles, awards, achievements): \_\_\_\_\_
  - Organization affiliations (religious, cultural, civic):  
\_\_\_\_\_
  - Special accomplishments: \_\_\_\_\_
  - Hobbies and Interests: \_\_\_\_\_
- Letters For Family/Friends (list names of people you want to write a personal letter)
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