

Checklist: I'm About To Have Surgery

Getting Started

Whether it's a simple procedure, or something more invasive, it never hurts to get some planning done first. Here's what we cover in this checklist:

- **Important Contacts:** Keep the people you care about connected with the important players in your life.
- **Advance Directive:** This Living Will/Health Care Proxy combo is a must for anyone entering the operating room.
- **Will:** This isn't only for your money and assets, but is vital if you have underage kids or care for a special needs adult.
- **Power Of Attorney:** Taxes, contracts, and other financial dealings might not be able to wait for you to completely heal.
- **Passwords & Unlocking Electronics:** Make sure someone you trust has access to your phone, computer, and other gizmos just in case.
- **Important Documents/Paperwork:** Share your financial basics, location of official documents, and other things in case you're laid up for a while.

Remember

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

IMPORTANT CONTACTS

- Emergency Name/Info: _____
- Work Name/Info: _____
- Doctor Name/Info: _____
- Financial/Accountant Name/Info: _____
- Lawyer Name/Info: _____
- Insurance Agent Name/Info: _____
- Other Name/Info: _____

ADVANCE HEALTH CARE DIRECTIVE

I Need To Create An Advance Directive

I Have An Advance Directive

Location Of Official Document: _____

Health Care Proxy (Name/Contact Info): _____

Notes: _____

I Don't Have An Advance Directive And I Don't Want To Create One

Why? (The default for medical treatment is to keep you alive at all costs. If that's what you want, let your loved ones know so there isn't any confusion.)

Health Insurance

Company Or Provider: _____

Acct. #/Other Info: _____

Notes: _____

WILL

I Don't Have A Will But I Need To Create One

I Have A Completed, Updated Will

Location Of Will: _____

Executor (Name/Contact Info): _____

Guardian Name/Contact Info (if applicable): _____

Date Created/By Whom: _____

Notes: _____

I Don't Have Or Want A Will

Why? (We're not judging you. Promise! However, you might want to explain your decision so your family is aware of why you didn't want to create a Will.)

POWER OF ATTORNEY

I Need To Name A POA

I've Named A POA

Type (circle one): Durable | Non-Durable | Springing | Don't Know/Not Sure

Location Of Official Document: _____

POA (Name/Contact Info): _____

Date Created/By Whom: _____

Notes: _____

I Don't Have Or Require A POA

Note: _____

UNLOCKING ELECTRONICS & DIGITAL ACCOUNTS

Make sure someone you trust knows how to access the following.

- Mobile Phone Computer Tablet Password Manager
 Other: _____

IMPORTANT DOCUMENTS/PAPERWORK

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

Financial Info

- Primary Bank: _____

(Circle all that apply) Savings | Checking | Investments | Mortgage | Loan | Safe Deposit Box | Trust | Other

Notes: _____

- Secondary Bank: _____

(Circle all that apply) Savings | Checking | Investments | Mortgage | Loan | Safe Deposit Box | Trust | Other

Notes: _____

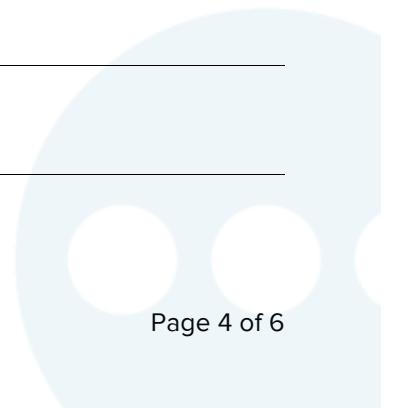
- Credit Cards: (circle all that apply) AmEx | Discover | Mastercard | Visa

Other: _____

Notes: _____

- Investments (Company/Institution Name): _____

- Location Of Tax Returns: _____



Important Document & Identification Location

- Birth Certificate
- Social Security Card
- Passport
- Marriage Certificate
- Other (Example: Club Memberships, State ID card):
- Driver's License
- Armed Forces ID / Discharge Papers
- Citizenship Documentation
- Divorce Decree / Settlement Info

Life Insurance Policy: _____
Policy Info (Company/Acct. #): _____

Property Deed/Lease Location: _____
More Info (Landlord/Plot #): _____

Auto Title/Lease Location: _____
Car Insurance (Company/Acct. #): _____

Other Vehicles/Property: _____
More Info: _____

Around The House

Include company providing the service and contact info if applicable.

- Electricity/Gas: _____
- Cable/Internet/Phone: _____
- Home Security: _____
- Cleaning/Garbage/Landscaping: _____
- Exterminator/Plumber/Electrician: _____
- Other: _____



NOTES & PERSONAL THOUGHTS

Use this section for additional information, personal thoughts, or anything we may have missed.
(Remember: You can do all of this a much easier way by creating an Everplan.)

CREATE YOUR EVERPLAN NOW: www.everplans.com

Create, securely store, and easily share all of the information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.