My Legacy Plan Tasks

- ☐ Complete Personal Information section
- ☐ Complete My Medical Information
  - Created a Living Will
  - Create a Power of Attorney
  - Complete "Things to be taken care of if I am temporarily unable to do them myself" section
- ☐ Complete Key Contact Information section
- ☐ Complete At the Time of My Passing section
- ☐ Complete Dependents section
- ☐ Complete Important Documents section
  - Create a Will
- ☐ Complete Financial Information section
  - Consider if anyone else is on each account, since Financial Power of Attorney ends upon death, preventing access to accounts that are only in the name of the deceased.
- ☐ Complete Commercial/Business section (if applicable)
- ☐ Complete What Beneficiaries Can Expect section
- ☐ Complete Personal Property section
- ☐ Complete Insurance section
- ☐ Complete Pets section
- ☐ Complete What to Pay, Close, and Cancel section
- ☐ Complete Email and Social Media section
- ☐ Complete Miscellaneous Information section
- ☐ Complete My Personal Wishes
- ☐ Complete Last Words

Mark a section 'Complete' if this is already covered by some other solution and make a note out to the side.