

CREATING YOUR LIFE FILE - A CHECKLIST FOR END-OF-LIFE PLANNING

For many years, we've provided information and advice to individuals about death with dignity and end-of-life care. Now, more than ever, we're receiving inquiries about end-of-life planning: what it involves and where to start.

There are many resources that explore this topic in depth, and it can be hard to know how to tackle what feels like a monumental task. In order to get you started, we've developed a checklist to help you create your life file (see or download it below).

What is a Life File?

A Life File is a central place to keep "how and what" documents that ensure your wishes are honored at the end of your life and your loved ones have the information they need to take care of your affairs when you die.

If you choose, it also can include guidelines for how to honor your life and your legacy.

We know that creating a Life File is an easy task to put off, but once you're done, you'll have peace of mind. And you don't have to do it all at once!

After you've compiled your Life File, make sure to revisit and update it if you experience a major life change like a marriage, illness, divorce, or the birth or adoption of a child.

Life File Checklist

Your Data and Documents

- [Create a password list.](#) Include phone, tablet, computer, email, social media accounts, etc. Consider using password software like LastPass or 1Password, which allows you to pass on your passwords to your heirs.
- [Review your social media accounts](#) and decide what you'd like to happen with them when you die. Every social media platform has different options.



- *Document your bank account information, including safe-deposit box locations.*
- *Document any life insurance policies and beneficiaries, including information on funeral insurance or pre-paid burial plot, if applicable.*
- *Include your will. Consider updating it if things have changed in your life since you last updated it.*
- *Make a list of bills with due dates and amounts. Note how statements are received and payments are made. Identify which bills are ongoing and which have an end date.*

Your Care

- *Create an advance directive, a document that articulates your wishes concerning medical treatments at the end of your life and designates an individual—your healthcare agent—to ensure those wishes are honored should you no longer be able to speak for yourself. *Make your advance directive specific.* Address a variety of different scenarios, e.g. in what situation you would want to receive morphine, when would you not want to be intubated, etc.*
 - *Consult tools and resources like The Mayo Clinic’s detailed guide to completing an advance directive or a comprehensive tool for creating an end-of-life care plan at MyDirectives.com.*
 - *Make copies of your advance directive to provide to your healthcare agent or trusted family/friends.*
- *Talk to your physician about your advance directive.* Explore whether your wishes can be turned into a POLST/MOLST (Physician/Medical Orders for Life-Sustaining Treatment) form in your state.
- *Have multiple conversations with your healthcare agent about your wishes.* Take them out to tea, have them over for dinner, go to a bar or library. Talk about what you want. This can be a serious conversation, or it can be full of laughs. You get to decide how this conversation plays out.

Your Possessions

- *Designate meaningful items to be given away to specific people. Consider doing so now, rather than spelling it out in your will. Consider*



reading [The Gentle Art of Swedish Death Cleaning](#), by Margareta Magnusson, to give yourself some guidance on how to slowly distribute important things to your loved ones.

- *Dispose of any items you own that you wouldn't want your heirs to find*, or include instructions about disposing of sensitive items, e.g., your high school diaries, for a trusted friend or family member.
- *Identify the location of any cash you have stored for emergencies and provide instructions on how to use it.*
- *Draft a "Where to Find..." document identifying the location of important things your heirs might need after your death: the deed to your house, the title and keys to your car, your social security and insurance cards, etc.*

Your Legacy

- *Write your own obituary.* Doing so will give you control over how you are publicly remembered.
- [Write down instructions for your final disposition.](#) What do you want to happen to your body when you die?
- *Plan for your funeral/remembrance ceremony.* Who are your chosen speakers? What music would you like to include? Write down and share your vision.
- *Create a message for loved ones.* Write a letter, make a video, or whatever you think will be most meaningful for the people who matter most.

Secure Your Life File

- *Purchase a fireproof home safe and a USB thumb drive to store your Life File.*
- *Make copies of the Life File's contents and leave them with a trusted friend or family member.*

Download PDF: "Life File Checklist"

