



MY PERSONAL NEEDS/WISHES CHECKLIST

Once this checklist is completed, be sure to upload it to your My Place Forever Online Vault, designate a Trusted Agent, and let family members know the document is housed in your Online Vault and who the Trusted Agent is and they have the ability to retrieve it.

1. ADVANCED DIRECTIVES

These directives dictate how you want certain aspects of your life and assets handled and managed upon the need. If you do not have these documents already, you can utilize My Place Forever’s partner legal service by locating the service under “My Resources” in your My Place Forever account.

Living Will and/or Health Care Surrogate.

Who is your designee?

Designee Name and Contact Information

Will and Testament.

Executor

Executor Name and Contact Information

Beneficiary(ies).

Beneficiary Name and Contact Information

Beneficiary Name and Contact Information

Beneficiary Name and Contact Information

Beneficiary Name and Contact Information



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Trust

Revocable

Irrevocable

Power of Attorney.

Designee Name and Contact Information

Do Not Resuscitate (DNR).

Original Copy Location: _____

Pre-Need Guardianship.

Designee Name and Contact Information

HIPAA Release.

Designee Name and Contact Information

Designee Name and Contact Information



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2. IMPORTANT PERSONAL INFORMATION

These are some of the important items which need to be accessible in your absence (e.g. in your personal My Place Forever vault with a trusted agent identified), if you are unable to access them. While some of these might be copies, it would be helpful to tell the Trusted Agent where s/he can find the physical ones.

- Health Care/Insurance.
- Life Insurance/Statement/Policy(ies) – Location of physical policy: _____.
- Mortgage Company/Statement(s).
- Car Payment/Statement(s).
- Credit Card Statement(s).
- Bank Statement(s).
- Power Bill/Statement(s).
- Water Bill/Statement(s).
- Telephone/Cellular Phone Bill/Statement(s).
- Internet Bill/Statement (s).
- Stock(s)/Bond(s) investment account statement(s).
- Investment account statement(s).
- 401k/Retirement/Pension Account Statement(s)/Information from Employer, Union, Military Service.
- Recreation vehicle statement(s) and/or title(s).
- Household Maintenance (e.g. Lawn, Cleaning, and Handyman Services).
- Business Related Documents (e.g. Incorporation Information, Partnership Agreement, Tax Related Statements, etc.).
- Email Account Information (Personal and Business).
- Paid Subscriptions (Online and Mail).
- Social Media Account(s).
- Digital Media (e.g. Computer Desktop Files and Photographs).



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- Organ Donor Card – Location of physical card: _____.
- Birth Certificate – Location of physical BC: _____.
- Passport – Location of physical Passport: _____.
- Medical Insurance Card – Location of physical IC: _____.
- Driver License – Location of physical DL: _____.
- Vehicle Registration – Location of physical VR: _____.
- Vehicle Title – Location of physical VT: _____.

3. MY PERSONAL VIP'S

Who needs to be immediately notified in the event of a life changing incident?

- Spouse.
- Child(ren).
- Parent(s).
- Sibling(s).
- Close Friend(s).
- Trusted Agent(s).
- Family Attorney.



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4. POST PASSING/PREPARATION FOR PASSING ACTION ITEMS

While this is a sensitive area, it is an extremely important component of life planning to ensure loved ones are not tasked with the “unknowns” of how you wish for actions to happen. These items can be pre-planned and organized by you now, and can be safely stored in your My Place Forever account’s online vault with a Trusted Agent identified.

Notify funeral home.

Preferred Funeral Home is:

Funeral Home Name and Contact Information

Schedule Appointment with funeral home to make final arrangements.

Service needs.

How remains will be cared for/placed (e.g. cremation).

Death Certificates (e.g. how many needed for creditors, insurance, employer pension programs, etc.).

Timeframe for funeral home processes.

Service program elements and wishes.

Notify/Request clergy.

Write and Publish obituary.

Determine if an Attorney is needed to assist in notifying:

Employer/Pension Service.

Probate related notifications (e.g. family recipients).

Contacting insurance companies.

Creditors.

Transfer of ownership of property (e.g. home, vehicle, etc.).

Social Security Administration (SSA).



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- Internal Revenue Service (IRS).
- Licensure entities.
- Doctor(s).
- Locate Will to Determine Health Care and Other Needs/Wishes.
- Personal Property Inventoried/Documented.
- Determine Family and/or Friends Named in the Will and Document Their Contact Information.
- Identify Liabilities Which Need Immediate Attention.
- I would like to be buried in (e.g. dress, uniform, suit, etc.): _____.



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Additional considerations and/or comments:
