

# THINKING AHEAD

# CHECKLIST

WEEK 2

*Below is a series of checklists broken up by day. Each day focuses on a different topic under the week's theme. Check off each of the tasks as you complete them to monitor your progress. More information about what to do each day is available in your Thinking Ahead emails.*

## DAY 8 FINANCIAL PLANNER

- Choose a financial planner
- Make an appointment with a financial planner during the next three weeks
- Prepare for your appointment
- Attend your appointment
- Record contact information for your financial planner

## DAY 9 TRUST & ESTATE ATTORNEY

- Choose a trust and estate attorney
- Make an appointment with a trust and estate attorney during the next three weeks
- Prepare for your appointment
- Attend your appointment
- Record contact information for your trust and estate attorney

## DAY 10 POWER OF ATTORNEY/NEXT OF KIN

- Choose a durable power of attorney
  - Make an appointment with your power of attorney (POA) during the next three weeks
  - Prepare for your appointment with your POA
  - Attend your appointment with your POA
  - Complete a power of attorney form for your state
  - Record contact information for your power of attorney
- Choose a next of kin
  - Make an appointment with your next of kin (NOK) during the next three weeks
  - Prepare for your appointment with your NOK
  - Attend your appointment with your NOK
  - Record contact information for your next of kin

## DAY 11 HEALTHCARE PROXY

- Choose a healthcare proxy
  - Make an appointment with your healthcare proxy during the next three weeks
  - Prepare for your appointment with your healthcare proxy
  - Attend your appointment with your healthcare proxy
  - Record contact information for your healthcare proxy
- Make an appointment with your doctor during the next three weeks
  - Prepare for your appointment with your doctor
  - Attend your appointment with your doctor
  - Record contact information for your doctor

## DAY 12 EXECUTOR

- Choose someone to be the executor of your will
  - Make an appointment with your executor during the next three weeks
  - Prepare for your appointment with your executor
  - Attend your appointment with your executor
  - Record contact information for your executor
- Choose a trustee to manage each of your trusts
  - Make appointments with your trustees during the next three weeks
  - Prepare for your appointments with your trustees
  - Attend your appointments with your trustees
  - Record contact information for your trustees

## DAY 13 INSURANCE AGENT

- Look back at your notes from last week about your insurance policies
  - Decide what kind of insurance you need (if any)
  - Choose an insurance agent
  - Make an appointment with an insurance agent during the next three weeks
  - Prepare for your appointment with your insurance agent
  - Record contact information for your insurance agent

## DAY 14 FUNERAL DIRECTOR

- Think about how you wish to be cared for after you pass away
- Contact a cremation provider or funeral home to schedule an appointment to learn more about your options for funeral services