

## **End of Life [EOL] Planning Checklist**

### **I. Getting Started**

- Identifying EOL Concerns/Issues
- Having Talks with Loved Ones

### **II. Essential File Documents**

- Advance Directives
- Bank Accounts
- Financial Statements
- Insurance Policies
  - Long Term Care
- Loans
- Marriage License
- Medications
- Medical Crisis Information
- Military (Discharge) Papers
- Passwords
- Pensions/Retirement Funds
- Power of Attorney Forms
- Property (Mortgages)/Auto Titles
- Safe Deposit Box
- Social Security/Medicare Information
- Tax Returns (past 4 years)
- Warranties/Contracts
- Will

### **III. Essential Contacts**

- Attorney
- Emergency Contact Persons
- Financial Advisor and/or CPA
- Funeral Home Director

\* Resource from the Office of Aging Ministry  
Archdiocese of Galveston-Houston

- Hospice
- Physicians
- Power of Attorney(s)
  - Medical
  - Financial
- Priest

### **IV. Celebrating EOL**

- Cherished Possessions
- Ethical Will (Cherished beliefs)
- List of Persons for Distribution
- Things I Still Want to Do In Life

### **List of Remembrances:**

- Achievements Most Proud of
- Favorite Memories: Child → Adult
- Most Loved & Influential People
- Most Enjoyable Activities
- Most Important Decisions Made
- Use of Charisms

### **V. Starting the Final Journey**

- Obituary
- Funeral Planning
- Spiritual:
  - Blessings (in Disguise)
  - Desires for Eternity
  - Forgiveness
  - Gratitude/Appreciation
  - How Faith Has Made a Difference
- Saying Good-byes
- What to Do When Death Occurs