



End of Life Planning Checklist



It's important to plan for your future. Putting a plan together for everything that belongs to you can be difficult to think about and planning it even more so. At Wright-Patt Credit Union® (WPCU®), we're here to help! We've compiled a checklist below to help you secure your future, leaving a plan in place for your family and friends. Once you complete the checklist, discuss the location of the following items with the executor of your estate.

Answer the questions below by checking the box next to the question/statement.

	Yes	No	N/A
Do you have beneficiaries listed on all financial institution accounts?			
Do you have a Power of Attorney or Living Will in place for health care directives in the event you are unable to make decisions for yourself?			
Do you have or plan to have a Trust in place?			
Do you have a written Will?			
Do you have any Power of Attorney documents in place?			
Do you have the following documents in a safe, accessible location? (Please also consider any dependents you may currently have.)			
• Birth Certificate			
• Social Security Card			
• Passport			
• Marriage/Divorce Certificate			
• Military Service Records/Discharge Papers			
• Veteran Benefits			
• Government/Disability Benefits			
• Mortgage/Deed Information			
• Rental/Lease Agreements (including storage lockers)			
• Motor/Recreational Vehicle Titles			
Do you have the following insurance information updated and in a safe, accessible location?			
• Life Insurance			
• Health Insurance			
• Home/Rental Insurance			
• Car Insurance			
Do you own a business? If so, do you have the following documents in a safe, accessible location (if applicable)?			
• Entity Documents (Operating Agreement, Bylaws/Constitutions, Charters, and/or Partnership Agreements)			
• IRS Documents (Tax Returns, W-9 Forms, EIN Certification Letter, and/or Schedule C)			
• Insurance Policies (Liability, Property, etc.)			
• Vendor Contracts/Agreements			
• Additional Contracts/Agreements			

