

## LEGACY PLANNING

# Checklist

- 
- 1** Contemplate and document your wishes in writing.

This may include your preferences for medical care, living arrangements, and end-of-life decisions.

- 
- 2** Contemplate what possessions and assets you want to distribute to heirs and charitable organizations.

Are there certain assets you want to hand down to specific individuals? Making decisions now – and communicating them – may eliminate family discord later.

- 
- 3** Protect yourself and your wishes while living.

Consider creating a living will or advance directives, health care power of attorney, HIPAA release form, and do not resuscitate (DNR) order, to ease any potential burdens on family.

- 
- 4** Create a will or estate plan documenting wishes for asset distribution.

Support the smooth transfer of assets and property to beneficiaries with a will or trust, durable financial power of attorney, or guardianship of kids/grandkids (if not already in trust or will).

---

---

**5 Assign beneficiaries to select assets.**

Bank accounts, retirement funds, and life insurance with named beneficiaries pass directly to a specific person or entity upon your death.

---

**6 Write a legacy letter or ethical will.**

These are personal letters where you can share your values, experiences, and life lessons with your loved ones. You can also record them digitally.

---

**7 Establish a legacy fund.**

A charitable fund outlining your interest areas and nonprofit organizations will ensure your philanthropic intentions live on in the future.

---

**8 Organize your records and financial documents.**

Keep a record of your bank accounts, investments, and insurance policies, your medications, your friends' contact information, your insurance agent, passwords, and more.

---

**9 Communicate with loved ones.**

Discuss your plans and wishes with your family and close friends. This can help avoid confusion and conflict later on.

---

**10 Review and update documents regularly.**

Your wishes and circumstances may change over time (divorce, new births, etc.). Regularly review and update your documents to reflect these changes.

---

**LEARN MORE: [OC-CF.ORG / LEGACY](https://oc-cf.org/legacy)**