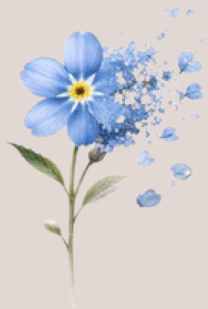


End-of-Life Care Checklist

PLANNING AHEAD

When the end stage accelerates, looking for phone numbers or paperwork is the last thing you need to be doing. Have a dedicated folder to keep information and documents you'll need during this time. There is no single right way to do this. Some items will matter more than others depending on your situation. Check off what applies to you; let go of the rest.

<u>The Papers</u>

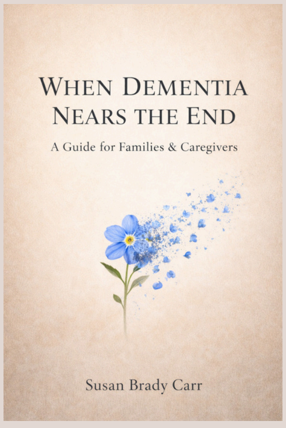
Health Care Proxy or Power of Attorney
Advance Directives (Living Will)
Do Not Resuscitate (DNR) or POLST
Medicare and Supplemental Insurance cards
Current medication list

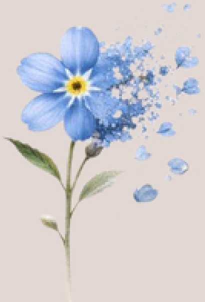
<u>The Contacts</u>

Primary doctor and emergency number
Hospice 24-hour triage line
Key family members
Funeral home (You don't need to pay or finalize plans yet, but knowing which one saves a mentally taxing decision later.)

<u>The Wishes</u>

Environment: Silence, soft music, or background noise from the TV?
Atmosphere: Dim lights? Window open? Special blankets or photos nearby?
Spiritual: Last rites, prayers, or cultural practices to arrange?
Visitors: Who should be present? Who should be called?





End-of-Life Care Checklist

When Your Loved One Passes

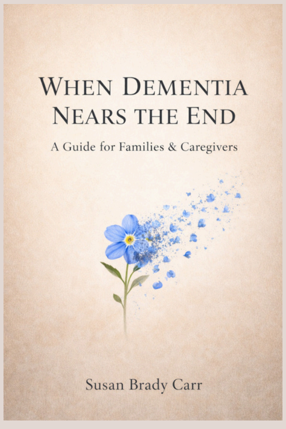
The first hours are going to be a blur, so just be prepared for that. These are the things that will need to be taken care of, and the order they need to happen.

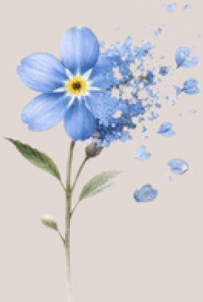
When death has occurred:

- **Call 911 or hospice (if enrolled):** If death occurred at home and hospice is not involved, call 911. If hospice is involved, call the 24-hour line first.
- **Let the immediate family know:** Call or visit in person if possible. This is not news to deliver by text.
- **Make decisions about viewing:** Do you want to spend time with your loved one after they have passed? This can happen at home or at the funeral home.
- **Contact the funeral home:** They will need the following from you:
  - Your loved one’s Social Security number
  - Date and place of their birth
  - Parents’ names, including mother’s maiden name
  - Veteran discharge papers (DD-214) if applicable

The first 24-48 hours:

- **Notify your employer:** If you're working, give them a call so you can arrange time off.
- **Notify extended family and close friends:** There’s no right or wrong way to do this. A phone call, email, or group text all work.
- **Contact life insurance companies:** If your loved one had life insurance policies, inform the company of the death; you’ll need to send them a copy of the death certificate.
- **Don’t make major decisions yet:** Let people offer to help, say yes to meals, childcare, or pet care.





End-of-Life Care Checklist

Within the first week or two:

- **Obtain certified copies of the death certificate:** Get extra copies, between 8-10, because you'll need them for bank accounts, insurance claims, investment accounts, and other areas.
- **Apply for survivor benefits from Social Security:** If your loved one was receiving benefits, reach out to Social Security to start that process.
- **Notify banks, credit card companies, financial advisors:** Let each institution know about the death and ask what needs to be done with the accounts. Individual and joint accounts may be handled differently, and you may also need to address automatic debits, direct deposits, recurring transfers, outstanding balances, and beneficiary designations.

A note to encourage you to plan before you need to...

If your loved one has been diagnosed with any kind of cognitive impairment, don't wait to begin planning. Talk through important financial, legal, medical, and personal decisions while they can still participate. You can even include, as part of the conversation or work on it on your own, writing your loved one's obituary. It may sound like a strange thing to do while someone is still alive, but you'll have more focus without a deadline pressing down on you or grief overwhelming you. Having a plan in place can really make the weeks and months after their death a little easier for everyone.