

Terminal Illness Checklist

<i>Checklist</i>	<i>Person Responsible</i>	<i>Date Completed</i>
<i>Get the information you need to make informed choices about end-of-life care.</i>		
<i>Get to know end-of-life care services that are available to you such as hospice and palliative care providers by going to the National Hospice and Palliative Care Organization's website: www.nhcopco.org</i>		
<i>Discuss your thoughts, concerns and choices with your loved ones.</i>		
<i>Talk to your healthcare agent, family and doctor about your choices.</i>		
<i>Discuss your choices often, especially when your medical condition changes.</i>		
<i>Establish advance directives (a living will and medical power of attorney) for your state.</i>		
<i>Keep your completed advance directives in an accessible place.</i>		
<i>Give photocopies of the signed advance directives to your healthcare agent, doctor, family, friends, clergy and anyone else who might be involved in your healthcare.</i>		
<i>Make sure you and/or a family member or friend is coordinating the "big picture" with a CERTIFIED FINANCIAL PLANNER™ Professional (CFP) or other qualified advisor.</i>		

Kensington Wealth Partners, Ltd.
 Managing Director: Paul A. Gydosh Jr., CFP®
 614-431-4311 • 1-800-832-7215
 Paul.Gydosh@LFG.com
 KensingtonWealth.com



Checklist	Person Responsible	Date Completed
<i>Make sure that your professional advisors (estate attorney, CPA, financial advisor) are all communicating with each other.</i>		
<i>Assess your financial situation, create a financial inventory and determine what end-of-life goals you want to accomplish that involve money.</i>		
<i>Do not fill out any beneficiary paperwork until you fully understand the company's contractual and/or IRS tax ramifications.</i>		
<i>If employed, check with your Human Resources Department to ensure all available benefits are maximized and that your beneficiary designations are current.</i>		
<i>If money is needed now, explore terminal illness riders available in many life insurance policies which allow for payments prior to death.</i>		
<i>Learn about the cost of end-of-life care, how medical bills and expenses will be paid for if you are not able to.</i>		
<i>Make financial decisions such as how you want to give your money and possessions to others upon your death.</i>		
<i>Prepare for the time when you cannot handle money matters; appoint a durable power of attorney.</i>		
<i>If possible/practical deal with unresolved family issues.</i>		
<i>Plan your funeral/memorial service.</i>		

Kensington Wealth Partners, Ltd.
Managing Director: Paul A. Gydosh Jr., CFP®
614-431-4311 • 1-800-832-7215
7650 Rivers Edge Drive Columbus, OH 43235
Paul.Gydosh@LFG.com
KensingtonWealth.com



Paul Gydosh is a registered representative of Lincoln Financial Advisors Corp. Securities and advisory services offered through Lincoln Financial Advisors Corp., a broker/dealer and registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. CRN201210- 2072913