

Terminal Illness Checklist

Checklist	Person Responsible	Date Completed
Get the information you need to make informed choices about end-of-life care.		
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.nhpco.org		
Discuss your thoughts, concerns and choices with your loved ones.		
Talk to your healthcare agent, family and doctor about your choices.		
Discuss your choices often, especially when your medical condition changes.		
Establish advance directives (a living will and medical power of attorney) for your state.		
Keep your completed advance directives in an accessible place.		
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.		
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.		
Make sure that your professional advisors (estate attorney, CPA, financial advisor) are all communicating with each other.		
Assess your financial situation, create a financial inventory and determine what end-of-life goals you want to accomplish that involve money.		
Do not fill out any beneficiary paperwork until you fully understand the company’s contractual and/or IRS tax ramifications.		
If employed, check with your Human Resources Department to ensure all available benefits are maximized and that your beneficiary designations are current.		



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If money is needed now, explore terminal illness riders available in many life insurance policies which allow for payments prior to death.		
Learn about the cost of end-of-life care, how medical bills and expenses will be paid for if you are not able to.		
Make financial decisions such as how you to give your money and possessions to others upon your death.		
Prepare for the time when you cannot handle money matters; appoint a durable power of attorney.		
If possible/practical deal with unresolved family issues.		
Plan your funeral/memorial service.		



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