



Preparing for our Next Step: . . .

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June 19, 2021

Why and why now?

- Greatest Gift we can give our survivors
- Sense of Satisfaction that we have addressed critical matters
- *Right now*, is when we need to do this!

Preparing for the steps when you are not in control flow chart



Who might the Local Agent be?

- ▶ Family Member
- ▶ Designated Team Agent
- ▶ Local non-related individual
- ▶ Retirement facility

Local Contact (non-relative)

- ▶ Trusted, reliable individual agreeable to serve as local agent until family and/or legal agent can assume responsibility
- ▶ Knowledgeable of and allowed to contact family as necessary in a manner per your instructions
- ▶ Willing to keep a duplicate key for and to manage our dwelling place until relieved by family and/or legal agent
- ▶ Accessible for check-ins on a regular basis
- ▶ Aware of the team members and willing to communicate with them

My responsibilities to that Local Agent

- ▶ *Provide written details* to the Local Agent that
 - ▶ List family members and team members are to be contacted
 - ▶ Identify location where *copies* of vital documents, labeled keys, door entry codes, and passwords may be obtained
 - ▶ Provide medical information to appropriate medical provider
 - ▶ Identify pending expenses and passwords necessary to maintain residence functioning
 - ▶ Provide Instructions/preferences for residence maintenance
- ▶ *Authorize*, if necessary, to enter domicile and contact team members and family
- ▶ *Notify* if any update or changes to the above

Preparation of Emergency Contacts List

- ▶ **Identify** emergency contacts
 - ▶ Family member(s)
 - ▶ Local agent
 - ▶ Durable power for health matters
- ▶ **Distribute to** where most likely used
 - ▶ Local Agent for his/hers record and/or for access electronically
 - ▶ My wallet and/or my smart phone
 - ▶ Available for Emergency personnel: Auto, vial of life, other visible home location
 - ▶ Accessible to Building manager, employer, etc.

Health Box

- ▶ Advance Directive (dated)
- ▶ Durable Power of Attorney for Health
- ▶ Health Care Provider and number
- ▶ End of Life information
 - ▶ UU pink sheet, celebration instructions?
 - ▶ Burial and cremation information including individuals to notify

Legal Box ⚖️

- ▶ Copies of Will and trust(s)
Deeds to properties, real estate, and auto
- ▶ Insurance: Life, Property, Auto, Liability
- ▶ Leases and liens
- ▶ Copies of powers **of health**, and legal
- ▶ Safe deposit box location and authorization

Financial Box \$

- ▶ IRAs, 501(c)(3)s, Social Security Benefits and annuities
- ▶ Bank and Brokerage accounts, and other incomes
- ▶ Current/recurrent payees including notifications, bills, debts, and subscriptions, etc.
- ▶ Asset List including other incomes with account numbers, beneficiaries/co-signers
- ▶ Income tax returns (3 years retention)
- ▶ Password location and access

Possessions

- ▶ Management of the residence
- ▶ Disposition of possessions including valuables
 - ▶ Consider giving gifting now and decrease your clutter
 - ▶ Identify, photo, and notify if intended to be given after death
- ▶ What to do with is still left?
 - ▶ Consider charity
 - ▶ Consignment and gifting

Checklist

- ▶ Designation of special person and provision of necessary information
- ▶ Powers of attorney for health and financial
- ▶ Post death plans and wishes
- ▶ Medical information including medications and provider
- ▶ Contacts in event of death or disability
- ▶ Asset and liability financial information
- ▶ Location for health, financial, legal and other documents
- ▶ Emergency information locations
- ▶ Identification of special possessions
- ▶ Passwords location and security
- ▶

-Julia Gregory