Preparing for our Next Step: . . .

John Holl and Julia Gregory June 19, 2021

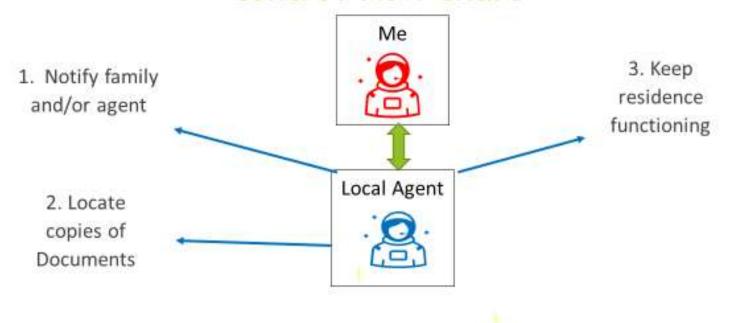


Why and why now?

- 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 1

- 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 flnancial information
- Location for health, financial, legal and other documents
- Emergency information locations
- Identification of special possessions
- Passwords location and security

-Julia Gregory