

Use this checklist to help you and your loved ones in case you become ill. Use it as a tool to help you think about what you already have in place and what you may need to create or update.

Your Documents

Locate and gather all of your important estate planning documents. If you cannot find them, give us a call and we may be able to send you copies:

Medical Power of Attorney

Financial Power of Attorney

Last Will and Testament or Pour-Over Will

Revocable Living Trust (if one has been prepared for you)

Living Will or Advance Directive

Memorial Instructions

Memorandum or instructions regarding tangible personal property

Make sure all of your health insurance cards are in your wallet. If you cannot find your card, you may be able to print off a temporary card from your insurance company's website. You will also want to make sure a new permanent card is sent to you. **Create a list** that includes your current medications, medical conditions (past and present), and any other relevant health information.

Primary health insurance

Secondary health insurance

Prescription drug card

List of medication, medical conditions, etc.

Locate the information on any short- or long-term disability insurance you have and review whether you would be covered if you contract COVID-19.

FOR YOU

Compile a list of important contacts.

Doctor's office phone number and address

The Human Resources Department or person at your company you would need to inform should you be diagnosed and not able to work

People you have recently been in contact with should you need to provide it to the Center for Disease Control