

Celebrating Over 30 Years...

J. Charles Dunham CFP®, CRPC®
Comprehensive Wealth Planner

Charles.Dunham@lfg.com
Telephone: (205) 263-5318
www.FirstFinancialGroupInc.com



...and Supporting You for the Next 30

John "Goose" Dunham
Comprehensive Wealth Planner

John.Dunham@lfg.com
Telephone: (256) 548-2158
www.JCDFinancialServices.com

Life Event Planning Checklist: End of Life

- Power of attorney for healthcare and living will
 - Pick somebody to make healthcare decisions on your behalf if you are incapacitated
 - This is best because if you pick more than one and they do not agree on the best course of action, it will cause discrepancies
 - Living will
 - This document dictates what medical treatments you do and do not want in different circumstances. It can help lessen the burden on your loved ones because they won't have to guess what you'd want done
- Physician order for life sustaining treatment
 - New option for people to dictate their end-of-life wishes
 - Once the client fills it out with their doctor and they sign it, it becomes the doctor's standing order and apart of the patient's medical record
- Getting financial affairs in order
 - Make sure your loved ones are aware of your important financial affairs
 - Passwords
 - List of professionals
 - Any relevant information
- Durable Power of Attorney
 - Appointing someone who can make sure bills still get paid and other financial matter are sorted out is essential if you become incapacitated
- DNR/DNI orders
 - "Do not resuscitate" or "Do not intubate"
 - Important to ensure medical personnel are aware of your wishes
- Diminishing capacity letters
 - This document gives the professional permission to call specific trusted individuals if they have noticed some diminishment in your physical, cognitive, mental, or psychological

- Organ donor designation
 - Checking the organ donor box on your driver's license is not enough
 - Your license may not end up at the hospital with you in an emergency, and your family has the potential to override the designation
- Life insurance
 - Make a list of all the people you regularly tell "I love you," and of those who you feel some financial responsibility for
 - Having enough and the right kind of insurance coverage can help ensure final obligations are met, and protect those individuals
- Will
 - Personal information about you and your spouse
 - Information about your marital status
 - Summary of your assets
 - Summary of your debts
 - Outline of beneficiaries
 - Names of people in you will who will represent your interests
 - Other relevant information
- Personal requests letter
 - Present your end of life wishes and any lasting requests in letter form