

# Get Your Ducks in a Row

These details belong to: \_\_\_\_\_

Date of last update: \_\_\_\_\_

***Get Your Ducks in a Row*** is a summary of key documents and tasks you should think about as you get older.

## ***Why do you need to think about this?***

- 1) It helps you consider your assets and wishes, so you can assess your financial health as well as plan for possible physical health issues, and
- 2) It puts in one place the information others will need when you can no longer handle your affairs.

**What should you do with this?** Print this document out, save it to your computer, give it to your partner – whatever it takes to keep it in your mind and make sure it's current. Our lives change, so remember to review it periodically to update it. Important details change when you marry, divorce, buy a home, downsize, move, reorganize, etc.

**Have the conversation!** It's not enough just to fill in the blanks, though that is the first step. We need to talk to our loved ones about this information, and about what our wishes are if we are no longer able to communicate them.

## Location of legal documents

Will (and trusts) \_\_\_\_\_

Advanced Directive (Living will) \_\_\_\_\_

Power of Attorney \_\_\_\_\_

Medical Power of Attorney \_\_\_\_\_

Beneficiaries \_\_\_\_\_

Bequests \_\_\_\_\_

## **Notes:**

\_\_\_\_\_

This document covers the basics, but you should add, edit, and delete as you need, based on what is happening in your life. Add more pages if necessary. Confirm you have the items, and jot down on the form where they are located. You may want to scan the documents with this form and save them on a flash drive.

**Remember:** Let one or two people you trust know where this information can be accessed if or when it is needed. Give this form and copies of other documents to the Personal Representative and Power of Attorney listed in your will, and keep a copy of this form with your other important documents (will, advanced directives, policies and licenses, etc.)

## Basic information

Full Name: \_\_\_\_\_  
First Middle Last  
(Other names) \_\_\_\_\_  
Birth date: \_\_\_\_\_ Social Security # \_\_\_\_\_  
Mailing address: (street, city, state, zip) \_\_\_\_\_  
Street address: \_\_\_\_\_  
Phone number(s) and phone company \_\_\_\_\_  
Email(s): \_\_\_\_\_  
Pet(s) \_\_\_\_\_

## Advisors

Attorney \_\_\_\_\_  
Financial/investment advisor \_\_\_\_\_  
Insurance agent \_\_\_\_\_  
Personal representative / Executor \_\_\_\_\_  
Clergy: \_\_\_\_\_

## In the event of my death, please contact

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Property I own (home and other assets, including out of state, loans, amount still owed)

\_\_\_\_\_  
\_\_\_\_\_

## Beneficiaries and bequests

Beneficiaries: \_\_\_\_\_  
\_\_\_\_\_

Bequests of personal items (list them here, or indicate location of your list):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Organizations I am a member of

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Life change documents or information (location of documents)

Birth Certificate \_\_\_\_\_  
Marriage Certificate (certified copy): \_\_\_\_\_  
Divorce decree: \_\_\_\_\_  
Military discharge: \_\_\_\_\_  
Employment (or date retired): \_\_\_\_\_

## Banking and Business (bank names and contact info)

Checking account(s): \_\_\_\_\_  
Savings account(s): \_\_\_\_\_  
Other bank account(s) \_\_\_\_\_  
Safety deposit box (and location of key) \_\_\_\_\_

401K, IRA: \_\_\_\_\_

Brokerage account, stocks, CDs, other savings or retirement funds:

\_\_\_\_\_  
\_\_\_\_\_

College savings (529 plan) \_\_\_\_\_

Mortgage(s) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Debt (credit cards, auto loans, school loans, etc.) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Account(s) on auto-pay (payee and how paid – credit card, bank account, other)

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Passwords** (for your computer, online websites, airline mileage plan, utility companies, autopayments, access code for phone, other?) List here or indicate where they can be found

\_\_\_\_\_  
\_\_\_\_\_

**Medical and Health:**

Primary Physician \_\_\_\_\_

Specialists \_\_\_\_\_

My medical records are located here \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Insurance policies** (company, agent, and contact information)

Life insurance \_\_\_\_\_

Health insurance \_\_\_\_\_

Dental \_\_\_\_\_

Visual \_\_\_\_\_

Audio \_\_\_\_\_

Long Term Care \_\_\_\_\_

Home/Rental Insurance \_\_\_\_\_

Auto insurance \_\_\_\_\_

Umbrella insurance \_\_\_\_\_

Other (pet insurance, other?) \_\_\_\_\_

**Family members, friends, and neighbors** (can answer questions or who should be notified in the event of my disability or death: (include phone and/or email)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Obituary information** (Parent's and siblings' names, your place of birth, education (high school, college(s), graduation date, major, employment history, resume?)

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**Burial preference, prior arrangements**

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**Plans for your pets**

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## Legal Documents

**See state requirements for these documents  
and where they should be stored/deposited**

- **Power of Attorney** (durable power of attorney) - the authorization to represent or act on another's behalf in private affairs, business, or some other legal matter
- **Medical Power of Attorney** (health care proxy) – the authorization to make medical decisions for a patient unable to make decisions regarding his/her own health
- **Advance Directive (Living Will)** – a legal document in which a person specifies what actions should be taken for their health care if they are no longer able to make decisions for themselves because of illness or incapacity
- **Will** (last will and testament) - a legal document that expresses a person's wishes as to how property is to be distributed at death and names one or more persons, the personal representative (executor), to manage the estate until final distribution

Signature \_\_\_\_\_ Date \_\_\_\_\_  
Printed name \_\_\_\_\_

This form was prepared by Aging at Home Fairbanks, using information from many different sources. We hope you find it useful. Handouts will be posted on our website – [www.aahfairbanks.org](http://www.aahfairbanks.org)  
Aging at Home at Home Fairbanks, [aahfairbanks@gmail.com](mailto:aahfairbanks@gmail.com), 907-799-4026



# Get Your Ducks in a Row!

## A Resource List

[www.gyst.org](http://www.gyst.org) Summarizes key docs and tasks for planning life's most important things

[www.theconversationproject.org](http://www.theconversationproject.org) Multimedia website focusing on helping people talk to loved ones and doctors about desires for end-of-life care

[www.fivewishes.org](http://www.fivewishes.org) Very simply written advance directive that helps record personal, spiritual, and emotional wishes for the end of life as well as medical wishes. Use in conjunction with Alaska state Advanced Directive form

[www.nhdd.org](http://www.nhdd.org) Website for National Health Decision Day, held annually, including the Conversation Project to help you discuss advance care planning with loved ones

[www.everplans.com/articles/downloadable-checklists-and-worksheets](http://www.everplans.com/articles/downloadable-checklists-and-worksheets) Downloadable resources for planning, creating, storing and sharing important documents

[www.caringinfo.org](http://www.caringinfo.org) National Hospice and Palliative Care website, links to brochures, resources, and state-specific advance directives.

[www.goodendoflife.com/worksheets/](http://www.goodendoflife.com/worksheets/) Includes plan for selecting advocates, a discussion guide for initiating end-of-life discussions, and directions for prep of a medical emergency document packet

[www.aarp.org/home-family/caregiving/end-of-life](http://www.aarp.org/home-family/caregiving/end-of-life) AARP has MANY links to help answer questions about wills, trusts, advance directives, probate, and more

[www.wiserwomen.org](http://www.wiserwomen.org) Website for the organization Women's Institute for a Secure Retirement. Includes resources to aid in planning for financial, health, and long-term care needs.

[www.firstcommand.com](http://www.firstcommand.com) Website for military families and survivors, with information on banking, investment, and "planning ahead" services. Outstanding planners' guide, Squared Away.

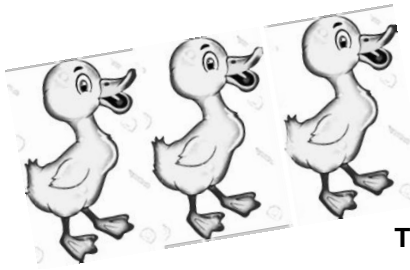
<https://newoldage.blogs.nytimes.com> Blogs on various timely topics on aging well

The following books are available at Noel Wien library, some also in electronic format.

Being Mortal, by Atul Gawande

The Tibetan Book of Living and Dying, by Sogyal Rinpoche

Gratitude, The River of Consciousness, or other books by Oliver Sacks



# Get Your Ducks in a Row

A five-part series

Discussions to help you plan for end of life

Thursdays, 3:30 pm Fairbanks Senior Center, 1424 Moore St.  
April 19, 26 and May 3, 17, 24, 2018

This series of discussions will help you take control of your life and be prepared, as much as you can be, for the coming years, so you can enjoy time with family and friends knowing you've put your affairs in order. This is an evolving process for all of us, but doing the hard work now will help you and your loved ones.

Topics for each of these sessions are suggestions, and speakers and attendees will share information and ideas.

**April 19      Your Information** – Pam Wagaman, Mary Ann Borchert  
What your family will need to know – a fill-in-the-blanks survey of your important information

**April 26      Your Will** – Mike Cavalliere  
And other important paperwork  
What is probate and when is it needed  
Who is eligible for Medicaid  
Where should legal documents be filed  
Who can access your bank accounts after you die

**May 3      Your Health Care** – Sara Patterson, Rev. Leslie Fails  
Have you told family and friends what you want?  
How to fill out the Alaska Advance Directives form  
Having 'the conversation' in the hospital, as well as before  
Where should Advance Directives be filed

**May 17      Your Finances** – Ben Roth  
Are you being smart with your money?  
Money matters!

**May 24      Wrap Up** – Mary Ann Borchert  
What you should do now for yourself  
Is your home safe  
Who are the people in your support system  
Have you signed up for Smart911  
Have you started downsizing  
Do you have a Plan B  
Have you had 'the conversation' with your family



Handouts will be posted at  
[www.aahfairbanks.org/communityresources/documents](http://www.aahfairbanks.org/communityresources/documents)

**Aging at Home Fairbanks**      [www.aahfairbanks.org](http://www.aahfairbanks.org)  
[aahfairbanks@gmail.com](mailto:aahfairbanks@gmail.com)      907-799-4026