

Planning for the Unexpected Checklist



These are tools to plan for future financial, medical and life services. Which of the following resources and tools do you have in place or have accessed. Are there other steps you need to take to be prepared for the future? Depending on your particular situation, all of the following may not apply. A financial or legal professional can help you.

	Get started	Progressing	Completed
Social Security			
Pension Benefits			
Veteran benefits			
Checking & savings accounts			
Investments			
❖ Individual Retirement Account (IRA)			
❖ Bonds			
❖ Certificate of Deposit (CD)			
❖ Stock certificates			
❖ Mutual Funds			
❖ Other			
Government assistance (SSI, general assistance, etc.)			
Insurance			
❖ Life			
❖ Liability			
❖ Health			
❖ Disability			
❖ Long-term Care			
❖ Other			
Guardianship papers (for children or others)			
Household Inventory			
Durable Power of Attorney			
Durable Power of Attorney for Health Care			
Advance Directive for medical treatment			
Living Trust			
Revocable Trust			
Will and Codicils			
Other:			
Other:			