



The Sojourner Project

...help for the journey

Legal and Financial Checklist

... just a few things to think about!

Financial

- Sources of Income / Benefits
 - Disability / social security (www.ssa.gov)
 - Pension / Retirement savings
 - Veteran's Benefits (www.va.gov)
- Bank and day to day finances
 - Bank
 - Checking / savings / CDs / Money Market
 - Joint Accounts / Beneficiaries / Payable on Death (POD)
 - Investment Accounts
 - Stocks / bonds / mutual funds
 - IRA / Roth / other
 - Beneficiary / Transfer on death (TOD)
 - Debts
 - Monthly household bills
 - Mortgage / other property
 - Loans / other debts
 - Credit cards
- Insurance
 - Medical / dental/ vision / prescription / Cobra
 - Medicare (www.medicare.gov or 1 (800) Medicare)
 - Original - with or without a Supplemental or Medi-Gap plan
 - or an Advantage Plan
 - Medicaid Eligibility / Medicaid Waiver
 - Disability / Long term care
 - Company name / policy documents
 - What does it cover when and how can it be used?
 - Life insurance
 - Company name / policy documents
 - Named beneficiary
 - Accelerated death benefit - a cash benefit option that can be used prior to death?
 - Funeral or burial insurance
- Home / cars / other property
 - Deeds / titles - ownership?
 - Property of value - jewelry / artwork
- Important papers / Records storage
 - Social Security card / passport / birth certificate / citizenship papers
 - Military Papers - Discharge papers (DD-214)

This information is for educational purposes only and does NOT provide any legal, medical or financial advice.
The goal is to provide general information so that you can seek out professional assistance from the appropriate subject matter expert

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Legal & Financial Checklist (continued)

- Important papers / Records storage (continued)
 - Marriage license / divorce / separation / adoption / spousal death certificate
 - Deeds / titles for all real estate / automobiles / other property
 - Tax Returns and other tax documents
 - Access: Keys / Login
 - File cabinet / safe
 - Safety deposit box / mailbox
 - Digital Life
 - Computer password / login
 - Websites: user name /login / password
 - Online accounts
 - Social media

Legal Documents

Medical Advanced Directives (www.caringinfo.org)

- Living will
- Durable Medical Power of Attorney
- Caregiver Agreement / Medicaid Waiver

Financial

- Financial Power of Attorney
- Living Trust / Medicaid Trust / Special Needs Trust / Revocable / Irrevocable Trust
- Letter of instruction - Final arrangements, specific gifts etc.
- Last Will and Testament

End of Life

- Living will / organ donation
- Do Not Resuscitate (DNR) or Allow Natural Death
- Funeral Plans / prepayments / contracts
 - Memorial service
 - Funeral home
 - Cemetery - burial / cremation

People / Contacts

- Attorney
- Accountant / Tax professional
- Financial advisor
- Insurance agent
- Banker
- Other?

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