Restfully

End-of-Life Organization Checklist

Everything a person should document and organize, for themselves and the people they love.

Note: Not every item applies to every person. Skip what doesn't apply. Return to this annually, or after any major life change (marriage, divorce, birth, death, new home, new job). This is not a legal document.

This is a long list. If you want help, use Restfully's Legacy Organizer to break this into clear steps and key things to consider. It's normal to feel overwhelmed. We're here to help.

Open the Legacy Organizer

PERSONAL LEGACY 7 items

01 **Letters or messages for specific people**
Handwritten or digital notes, videos, or voice recordings for your spouse, children, or close friends. These become treasures.

02 **Ethical will or values statement**
What values, lessons, or beliefs do you want to pass on? Different from a financial will. This covers your character, not your assets.

03 **Obituary notes**
Key facts, achievements, and stories you'd want included. Don't make your family guess.

04 **Key memories you want preserved**
Stories, photos, or places that define your life and should be passed down.

05 **Charitable giving preferences**
Organizations or causes you'd like donations directed to in lieu of flowers, or through your estate.

06 **Spirituality and religion preferences**
What role, if any, do you want faith or spiritual practice to play in your end-of-life and service?

07 **Things to share after death**
If there is something you'd want disclosed after you're gone, document it and name who should receive it and when.

FAMILY & CAREGIVING 5 items

08 **Child care plan**

Beyond naming a guardian in your will: daily routine, school info, medical needs, favorite people, and what matters to your child's sense of stability.

09 **Pet care plan**

Named caretaker (who has already agreed), vet contact, medications, diet, and quirks your pet's new family needs to know.

10 **Emergency contacts**

A clear, current list: not just next of kin but also close friends, neighbors, and anyone who should be called first.

11 **Military records (DD Form 214)**

If you served honorably, this document is required to claim military funeral honors. Keep it accessible and tell your family where it is.

12 **Business succession plan**

If you own a business: who takes over, what happens to employees, and where the key business documents are stored.

PROPERTY & PHYSICAL ASSETS 7 items

13 **Real estate**

For each property: address, deed location, mortgage lender, and property insurance policy.

14 **Vehicle titles**

Cars, motorcycles, boats, RVs: make, model, title location, and lien holder if financed.

15 **Home / renters / umbrella insurance**

Insurer, policy number, and agent contact for each policy.

16 **Prized possessions and heirlooms**

List specific items with intended recipient and the story or reason behind it. This prevents conflict.

17 **Valuable items (jewelry, art, collectibles)**

Estimated value, appraisal documents if available, and where they are stored.

18 **Items to donate, sell, or discard**

Give your family guidance on what you'd like done with things that aren't specifically named.

19 **Home access and security**

Spare key location, alarm codes, safe combination, and home warranty info.

DIGITAL ASSETS 8 items

20 **Password manager or master account list**

Your family needs access to your accounts. Use a password manager and leave instructions for how to access it, or keep a sealed envelope updated annually.

21 **Email accounts**

Which email addresses you use and what you'd like done with them. Gmail allows an Inactive Account Manager.

22 **Social media accounts**

Facebook, Instagram, LinkedIn, X: do you want them memorialized, deleted, or managed? Name who is responsible.

23 **Cryptocurrency and digital wallets**

Wallet addresses and how to access them. Seed phrases should be stored securely offline, never in this document. Reference a location.

24 **Domain names and websites**

Any domains or sites you own: registrar, login, and what to do with them.

25 **Subscriptions to cancel**

Streaming services, software, memberships. These continue to charge. List them so your executor can cancel.

26 **Cloud storage and digital files**

Google Drive, iCloud, Dropbox: where your photos, documents, and files live and how to access them.

27 **Digital media libraries**

iTunes, Kindle, Audible: note what you own and whether licenses are transferable (often they aren't, but your family should know).

NOTES

FINANCIAL ACCOUNTS & ASSETS

13 items

28 **Bank accounts**

For each account: institution, account type (checking/savings), last 4 digits, and how to access.

29 **Investment and brokerage accounts**

Firm name, account number, and adviser contact if applicable.

30 **Retirement accounts (401k, IRA, Roth IRA)**

Institution, account number, current beneficiaries on file.

31 **Review beneficiary designations**

Beneficiaries on 401k, IRA, and life insurance override your will. Verify they are current and correct. This is one of the most commonly overlooked steps in estate planning.

32 **Pension or annuity**

Employer, plan administrator contact, and how survivor benefits work.

33 **Equity / stock options (RSUs, ESPP)**

Company, vesting schedule, and what happens to unvested shares at death.

34 **Life insurance policies**

Insurer, policy number, face value, premium, and named beneficiaries. Note term vs. whole.

35 **Outstanding debts and loans**

Mortgage, auto loan, student loans, personal loans: lender, balance, and monthly payment.

36 **Credit cards**

Issuers, account numbers, and whether any authorized users need to be contacted.

37 **Airline miles and credit card rewards points**

Program names, account numbers, and transfer or transfer-at-death options. Many expire quickly and are almost always missed.

38 **Safe deposit box**

Bank name, box number, and key location. Who is authorized to access?

39 **Tax records and accountant contact**

Location of recent returns (at minimum last 3 years) and CPA name and contact info.

40 **Pre-paid funeral or burial arrangements**

If you have pre-paid, note the funeral home and policy number so your family can access it.

FUNERAL & MEMORIAL PREFERENCES 8 items

41 **Type of service**

Funeral (body present), memorial service, or celebration of life? Religious or secular? Formal or relaxed?

42 **Body disposition preference**

Traditional burial, cremation, green burial, aquamation, human composting, body donation to science. What do you want, and why?

43 **Final resting place**

Specific cemetery or plot? What to do with ashes if cremated? Have you pre-purchased anything?

44 **Preferred officiant or leader**

A clergy member, celebrant, or specific family member or friend.

45 **Music preferences**

Specific songs, genres, or artists you'd want played. Also, anything you'd explicitly not want.

46 **Readings, prayers, or rituals**

Specific poems, scripture, or secular readings. Any religious or cultural rituals that matter to you.

47 **Guest list guidance**

Is there anyone you'd specifically want notified or specifically not invited? Anyone who should speak?

48 **Budget guidance for the service**

Funeral overspending from grief is extremely common. Give your family a range or a philosophy ("keep it simple," "don't hold back").

NOTES

END-OF-LIFE CARE PREFERENCES 5 items

49 **Comfort care and palliative care wishes**
Do you want aggressive treatment or comfort-focused care? What does "quality of life" mean to you? Any religious considerations?

50 **Where you want to die**
At home, in a hospice facility, or in a hospital? Document your preference.

51 **Who you want present**
If you have preferences about who should be with you at the end, name them.

52 **MAiD or VSED preference**
If you are in a jurisdiction where Medical Aid in Dying or Voluntary Stopping of Eating and Drinking is legal, document your views so your proxy knows your values.

53 **Future living preferences**
If you become unable to live independently: what triggers a move? Assisted living vs. in-home care? What matters most to your sense of dignity?

MEDICAL 7 items

54 **Current medications list**
Name, dosage, frequency, prescribing physician. Keep updated.

55 **Allergies and drug reactions**
Document all known allergies, including medications, foods, and environmental.

56 **Key medical contacts**
Primary care physician, specialists, therapist: names, practices, phone numbers.

57 **Medical history summary**
Major diagnoses, surgeries, hospitalizations. Useful for emergency responders and your proxy.

58 **Health insurance policies**
Insurer name, policy number, group number, and how to access coverage information.

59 **Organ and tissue donation preferences**
Are you registered in your state's donor registry? Is it noted on your driver's license? Have you told your family?

60 **Life-sustaining treatment preferences**
Ventilator, feeding tube, dialysis, CPR. Document your wishes for each scenario.

LEGAL & ESTATE
8 items

61 **Will / Last Will and Testament**
Location of the signed document.

62 **Revocable Living Trust**
If applicable, document the trust name, trustee, and successor trustee.

63 **Advance Healthcare Directive / Living Will**
Your documented wishes for medical care if you can't speak for yourself.

64 **Durable Power of Attorney for Healthcare (Healthcare Proxy)**
Name the person authorized to make medical decisions on your behalf.

65 **Financial Power of Attorney**
Name the person authorized to manage your finances if incapacitated.

66 **DNR (Do Not Resuscitate) Order**
If you have one or want one, document it and ensure your healthcare proxy knows where it is.

67 **POLST (Physician Orders for Life-Sustaining Treatment)**
For those with serious illness. More detailed than a DNR. Must be signed by a physician.

68 **Guardianship for minor children**
Name the guardian in your will. Confirm they have agreed.

Legally documenting your plans is key. If you need help, visit our resources online.

Did we miss something? Email us and we'll add it.
