

Life Planning Checklist

Life Planning Checklist	Completed Date	Reviewed Date	Updated	Updated	Updated
Letter of Intent					
Notify relatives and friends if you have established a Trust, and if they want to leave money to your loved one, leave it to the Trust					
Copy of Birth Certificate					
Copy of Social Security Card					
Copy of all medical cards (Medicaid, Medicare, etc.)					
Information about/letters from the Social Security Administration (types of benefits received)					
Choose 3 people who have agreed to become a guardian or advocate					
Establish a Trust, if desired					
Notify the County Board of MR/DD or other appropriate agencies that you have established a Trust					
Signed my Last Will and Testament					
Change beneficiaries on all accounts/policies removing my loved one's name					
Made copies of this plan and have given it to family members					
Copy of Durable Power of Attorney					
Copy of Health Care Power of Attorney					