

Chart Your End-of-Life Treasure Map™

Name/Date: _____

Every ADULT should have a “Treasure Map”! This is a gathering of important papers, records and instructions on how to locate all the valuable things and accounts in your life.

This is not just for “elders”, because we all know that sometimes people die in their 40s or 50s... or earlier.

There’s great relief in having compiled your very own **Treasure Map**. You can relax knowing that your wishes are clearly stated, that your records are complete, and that you’ve compiled everything in one place. Then you can set it aside, and GO LIVE YOUR LIFE.

(Since the **Treasure Map** contains private, personal information, it should be stored in what you deem to be a safe place.)

Talk About It

A vital note: first, you’ve got to THINK about it... then YOU’VE GOT TO TALK ABOUT IT! Once you’ve clarified your wishes, you MUST chat with the person you’ve selected to be your Power of Attorney and the other important people in your life. TELL them what’s important to you and where you’ve stored your **Treasure Map**. Tell them how you want your later days to go. Talk to your family, doctor, attorney...

And if you don’t do this for your own sense of “Ahhhhh”... do it to ease the burden your loved ones will bear after your death.

Formats

There are many formats in which you can gather your **Treasure Map**:

Three-Ring Binder – Very flexible in its content. You can add and subtract pages, include photocopies of documents and avoid the bulky structure of a hard box, folders or a bound book.

Bound Books – There are many end-of-life planning books available online with amusing names. You can’t add/subtract pages or documents, but these books provide a good set of questions to answer.

Next-of-Kin Boxes (NOKBOX) – These are very handy as a large box full of file folders for you to fill. They’re very organized, but bulky.

Whatever format you choose for your **Treasure Map**... Do it! This is critical.

Checklists

Where do you start? The following is a checklist to lead you in compiling your **Treasure Map**. Make copies of your documents to add to your **Map**. (A binder is most feasible.)

Items listed in bold purple are ESSENTIAL.

Items listed in black are HIGHLY SUGGESTED.

IDENTIFICATION

- Health Insurance Card**
- Medicare/Medicaid Card**
- Driver’s License**
- Social Security Card**
- Passport
- Birth Certificate - certified original

Tender Doula
End-of-Life Companion



MEDICAL

- Durable Power of Attorney: Healthcare**
- Advance Healthcare Directive**
(Discuss the ramifications of each choice with your doctor)
- POLST/DNR Form**
(When desired; signed by your doctor)
- Dementia Advance Directive
- Mental Health Advance Directive
- SED by AD (Stopping Eating and Drinking by Advance Directive)

PERSONAL

- Vital Statistics Planning Form**
(Info for death certificate, obituaries, service, memorials)
- End-of-Life Values
- Letter(s) to family/friends,
(Either general or specific)

FINANCIAL

- Durable Power of Attorney: Finance**
- TOD: Transfer on Death Designation(s)**
- Social Security: Advance Designation of Representative Payee**
- One statement from each bank/financial account
- Tax returns for two Years
- Credit card copies and statements

PROPERTY

- Will or Trust**
- Executor or Trustee Designation**
- Asset allocation of individual belongings
(Separate addendum to the Will, may include items of high or low monetary value, as well as personal significance)
- Mortgage and property tax records
- Titles/Deeds to home, car, properties
- Thumb drive with video walk-through of the house and contents
- Lockbox and safe locations/access

RECORDS

- Priority Contact List**
(Your POA likely will not know all your friends that should be contacted in case of your extreme illness or death.)
Tier 1: Immediate notification
Tier 2: Prompt notification
Tier 3: Eventual notification
- Digital Legacy: Logins, Passwords, Codes**
Phone and computer passcodes, home wifi, utilities, online accounts, Amazon, Apple, phone carrier, Adobe, Hulu, Netflix, etc., etc.! Password Manager master code.
- Medicare and Health Insurance Docs**
- Names and Contact Info for Physician, Accountant, Financial Advisor, Lawyer, Spiritual Advisor**
- Marriage/Divorce records - certified originals
- Home and Car insurance docs

POST-DEATH WISHES

- Designated Agent**
(The one that makes funeral arrangements.)
- Disposition (of Body) Authorization Form**
(For burial, cremation or other disposition)
- Cremation/Burial funds and arrangements
- Memorial/Life celebration wishes
- Readings for funeral/memorial:
poetry, prose, bible, other
- Playlist of meaningful, personal music
(For your last days, and at your memorial)

This document is not intended as legal advice. Your state may have specific laws about how these documents should be completed. Consult local counsel and physician's advice for guidance specific to your situation.

Notes: _____

