

ESSENTIAL PEACE OF MIND CHECKLIST

LEGACY LAB APP



LEGACY LAB

Prepare Those You Love Most

HOW TO USE THIS CHECKLIST

Planning for the end of life isn't easy to think about, but it's one of the most loving and empowering things you can do for yourself and those you care about. Whether you're organizing your own affairs or helping a loved one prepare, this checklist will guide you through the key steps to make sure everything is in order when the time comes.

Why does end-of-life planning matter? End-of-life planning goes far beyond writing a will. It's about protecting your legacy, easing the burden on your family, and ensuring your wishes are legally, financially, and personally honored.



INCLUDED IN THIS LIST

- Legal Documents
- Financial Information
- Digital Assets
- Personal Wishes
- Legacy Messages
- Who to Notify
- Quick Print Option

“WHAT YOU LEAVE BEHIND IS
WOVEN INTO THE LIVES OF
OTHERS.”

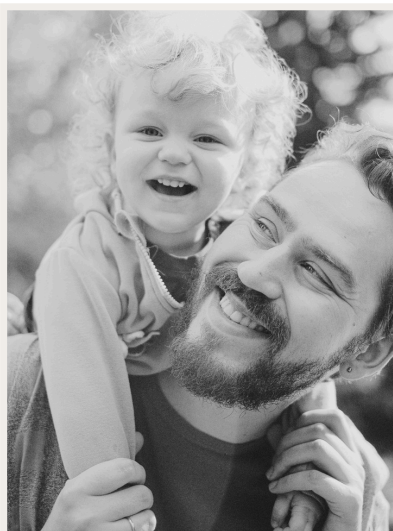
PERICLES

LEGAL DOCS

LEGAL DOCUMENTS

Start by ensuring your legal wishes are clearly documented.

- Last Will and Testament – Specifies how your assets should be distributed.
- Living Will or Advanced Directive – Outlines your preferences for medical treatment if you're incapacitated.
- Durable Power of Attorney – Appoints someone to make legal or financial decisions on your behalf.
- Healthcare POA– Names someone to make medical decisions if you're unable to do so.
- Guardianship details should you have minor children.
- Instructions for pet care.



"DEATH IS NOT THE OPPOSITE OF
LIFE, BUT A PART OF IT."

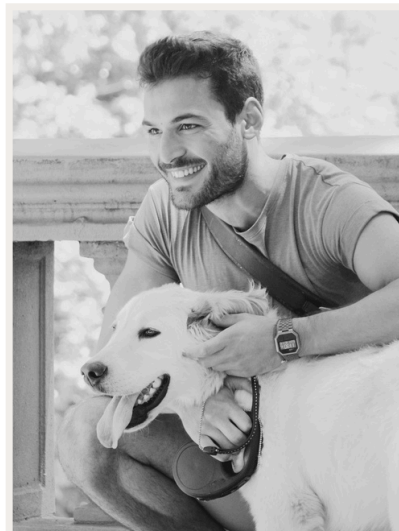
HARUKI MURAKAMI

FINANCIAL

FINANCIAL INFORMATION

Help your loved ones avoid confusion by organizing your financial footprint.

- Bank Account Information - Including account numbers and institutions
- Debts and Liabilities - Loans, Mortgages, Credit Cards
- Investment Accounts and Retirement Funds - Make sure you have named beneficiaries for all accounts
- Insurance Policies - Life, Health, Auto, Etc.
- Titles to Vehicles
- Tax Records and Accountant Contact Info



"THE SONG IS ENDED / BUT THE
MELODY LINGERS ON."

IRVING BERLIN

DIGITAL

DIGITAL ASSETS

Your online presence is part of your legacy. Don't leave it behind without direction.

- Email and Social Media Logins
- Cloud Storage Access - Google Drive, iCloud, Dropbox, Etc.
- Streaming and Subscription Services
- Digital Wallets and Cryptocurrencies
- Online Businesses or Domains



"LOVE IS HOW YOU STAY ALIVE,
EVEN AFTER YOU ARE GONE."

MILANO MONUMENTS

PERSONAL

PERSONAL WISHES

Make your preferences known so your family isn't left guessing.

- Funeral or Memorial Instructions
- Preferred Burial or Cremation Choices
- Organ Donation Wishes
- Obituary Details



"CARVE YOUR NAME ON HEARTS,
NOT TOMBSTONES. A LEGACY IS
ETCHED INTO THE MINDS OF
OTHERS AND THE STORIES THEY
SHARE ABOUT YOU."

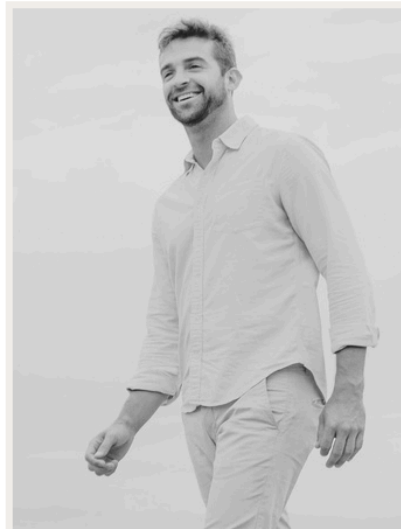
SHANNON L. ALDER

MESSAGES

LEGACY MESSAGES

Leave behind words that matter.

- Write Letters to Loved Ones
- Record Videos or Voice Messages
- Document Family Stories or Values
- Share Photos or Meaningful Quotes



“YOUR STORY IS THE GREATEST
LEGACY THAT YOU WILL LEAVE TO
YOUR FRIENDS. IT’S THE LONGEST-
LASTING LEGACY YOU WILL LEAVE
TO YOUR HEIRS.”

STEVE SAINT

CONTACTS

WHO TO NOTIFY

List key contacts to be informed when the time comes.

- Immediate Family
- Friends and Close Colleagues
- Legal and Financial Advisors
- Employer or HR Department
- Religious or Community Leaders
- Other Professionals Who May Know About Your Assets and How to Care For Them





LEGACY LAB
Prepare. Help. You Love Best.

LEGACY LAB APP | THE ESSENTIAL PEACE OF MIND CHECKLIST
www.LegacyLabApp.com

LEGACY LAB

QUICK PRINT CHECKLIST

Print these three pages for an easy, condensed checklist to help you get started with your legacy organizing in Legacy Lab.

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