



To-Do List for Personal Advance Planning

TO GET STARTED



We recommend you begin by decluttering your home. Gather important documents such as birth certificates, social security cards, bank and financial information, healthcare records and contact information. Consider where you would like to live in 10, 20, and 30 years. Can you safely and comfortably age in place in your current home, or will you need to plan for a different setting?

Organize Important Documents

These documents contain sensitive information and should be stored safely and securely.

- ☐ Birth and marriage certificates, valid passport (especially if you want to be buried out of the country)
- ☐ Social Security numbers
- ☐ Property deeds and titles
- ☐ Bank, retirement, and investment accounts
- ☐ Insurance policies
- ☐ Contact list for your rabbi, healthcare providers, and powers of attorney.
- ☐ List of digital accounts: Include passwords and access instructions (e.g., email, social media, subscriptions).
- ☐ Emergency Contact List: Include close family/friends to notify in case of an emergency.

FINANCIAL, LEGAL, AND HEALTHCARE PLANNING



Some of these steps may require an attorney. This checklist will prepare you for meeting with an attorney as well as identify what you can do on your own.

Financial Planning

- ☐ **CREATE A WILL:** Outline who will receive your assets, name guardians for any dependents, and include any specific wishes. Learn more about how to ensure your assets are distributed in accordance with Jewish law and download a halachic estate shtar (document) at ematai.org/shtar.
- ☐ **ESTABLISH A TRUST:** (if needed) To manage specific assets and tax requirements.
- ☐ **ASSIGN POWER OF ATTORNEY:** Appoint someone to handle your financial/legal matters if you become incapacitated.
- ☐ **DONATION WISHES:** Specify any charities or causes you'd like supported.
- ☐ **EXECUTOR INSTRUCTIONS:** Provide clear written guidance for your executor on managing your estate. Speak with your attorney about how you can ensure your family has access to funds if needed before the will is probated.
- ☐ **DEBT OVERVIEW:** Overview of monthly expenses: List all loans, mortgages, rent, and bills such as utilities, phone, credit cards etc..
- ☐ **ORGANIZE INSTRUCTIONS FOR ACCESSING FINANCIAL RECORDS:**
For example: retirement funds, investment accounts, contact information for financial advisors.
- ☐ Speak with an attorney about guardianship if relevant

Funeral Planning

- ☐ Consider prepaying for funeral expenses. Contact your local funeral home for more information.
- ☐ Purchase a burial plot and tell your family where it is located.
- ☐ Consider setting aside funds for burial expenses that can be accessed immediately after death, including for family travel.

Healthcare Planning

Requirements vary by country and state, check what applies to you.

- ☐ **ADVANCE DIRECTIVE:**
 - ☐ Healthcare Proxy: Choose someone to make medical decisions if you're unable to. Discuss your values and preferences with this person and your family.
 - ☐ Download Ematai's Robert M. Beren Healthcare Directive & Conversation Guide at ematai.org/directive.
- ☐ **PURCHASE OR REVIEW LIFE INSURANCE POLICIES:**
Make sure they are up to date and list the correct beneficiaries.
- ☐ **CONSIDER LONG-TERM CARE INSURANCE.**



Medical Information

- ☐ Health information changes often, consider keeping details in an online or digital format for easier updates.
- ☐ Medical Summary: Include your medical history, current medications, allergies, and pharmacy contact info.
- ☐ Provider Contacts: List names and phone numbers of your doctors and specialists.

PERSONAL, EMOTIONAL, AND PRACTICAL CONSIDERATIONS



Legacy and Emotional Support

- ☐ Share your family's history, traditions (minhagim), and values. Consider writing a legacy letter or recording a video. Contact Ematai to learn more about legacy letters.
- ☐ List tzedakah (charitable) organizations that are meaningful to you—and explain why.

Household and Family Care

- ☐ Home Maintenance: Provide a schedule of seasonal tasks (e.g., filter changes, weather prep).
- ☐ Childcare Plans: Include medical needs, school contacts, therapy schedules, and preferences.
- ☐ Pet Care Instructions: Feeding routines, vet info, behavioral notes.

Disclaimer: Nothing in this planning list should constitute legal advice from Ematai. Please consult with your attorney for any questions.