

Checklist for 'Facing the Future' [version 02]

1. Do it now

Let your family and closest people know all the key information and where to find it. For example, hospitals or GPs won't know your wishes unless relatives or people close to you can produce the legal documents you have prepared. It is a deep gift to those closest to you not to leave them with an almighty mess to clear up after you, or to be left with dozens of questions that you could so easily have answered. And it's much easier for them if they can contact other key people and organisations, rather than being contacted for weeks or months afterwards, unexpectedly, by people who didn't know what had happened to you.

You can find many useful resources, further information and helpful organisations at <http://alexandermassey.com/facing-the-future>

2. Organise

- A copy of everything is located here: ...
- I have informed ... where to find all this information
- In your home, leave information clearly – by a phone, on your desk, on a noticeboard, of at least two people who can be contacted who know how to access all this information.

3. Personal details

- Full name
- Hebrew names
 - My Hebrew name
 - My parents' Hebrew names
- Address
- Landline
- Mobile
- Email(s)
- Birthday
- National Insurance number

4. Family members and close friends – anyone listed in your Will, Living Will and Power of Attorney documents should be included here:

Full name	Relationship	Phone numbers	Email(s)	Home address	Other info

5. Work contacts

- This information can be found here: ...
- Employer (name, phone, email)
- Clients (name, phone number, email)

- Logins and passwords to contact lists: ...
- Music or other teacher:
- Coach (business, life):

6. Jewish contacts

- Synagogue or other Jewish community (include contact name, phone number, email, land address)

7. Licenses and Policies: Confirm you have/need copies, and where located

8. Marriage Certificate (certified copy)

9. Birth Certificate

10. Insurance

- Car insurance
- Home insurance
- Home Contents insurance
- Travel insurance
- Life insurance
 - I have researched Life Insurance options and purchased the best possible plan for me and/or my family
 - I have researched Short term Disability and completed all steps
 - I have researched Long term Disability and completed all steps
 - A copy of my policy is located here:
- Other insurance (e.g. household appliances, phones, cameras, special equipment)

11. Finance, Banking, & Business

- I have reviewed my financial situation and, if necessary, discussed this with those closest to me
- I have completed a budget and track monthly actual costs to my budget
- I have a plan in place to meet my goal to have £... by this date ...
- I have set up a Property and Financial Affairs Lasting Power of Attorney (LPA) [NB An LPA for Health and Welfare must be set up separately] My Property and Financial Affairs LPA is likely to outlive me. I review this regularly.
- Current account(s):
- Deposit/savings account(s):
- Other bank account(s):
- Income protection plan (including long term disability)
- Emergency savings
 - I have ... weeks/months of expenses saved in case of accident, emergency, or short term disability
- Retirement funds (including if you stop earning prematurely)
- Provision for dependants (ongoing life, college savings etc)

- Stocks, Shares, ISAs:
- Other savings:
- Account(s) on auto-pay, standing orders and direct debits:
- Debt (credit cards, school loans, short term):
- Mortgage:
- Other investments (e.g. Buy-To-Let property)
- I have talked through with my life partner and/or anyone else with whom I share joint financial responsibilities what will happen for them in relation to these responsibilities.

12. Passwords

- This information can be found here: ...
- Home computer username and password:
- Laptop username and password:
- Online banking accounts:
- Mobile phone password:
- Email(s):
- Website(s):
- Social networking sites (Facebook/Linkedin/Flickr/etc.):
- Online accounts (Netflix, iTunes, Amazon, etc):

13. Medical and Health

- I have discussed my wishes with friends and family (care, housing, reduced mental capacity, medical eventualities).
- I have considered where and how I would like to be cared for if I were terminally ill and discussed this with those closest to me.
- My Advance Decision and Advanced Statement documents are located here: ...
- Medical Insurance: (company and account #)
- Medications:
- Existing Conditions:
- Allergies:
- Allergies to medications:
- Primary Care Physician (GP):
- Specialist(s):
- Therapist:
- Pediatrician:
- I have set up an arrangement (eg with MedicAlert) for wearing a bracelet / necklace / watch with key information, so that I receive fast, relevant medical treatment in an emergency.
- Next of kin:
 - Life partner
 - 2nd contact (or 1st, if no life partner or life partner has reduced mental capacity)
- Advance Decision including DNAR (Do Not Attempt Resuscitation) and CPR (Cardiopulmonary Resuscitation)

- I have taken into consideration that making my Advance Decision after my LPA would invalidate the LPA
- I have signed my Advanced Decision document and had it witnessed
- NB Check the current rules about making a 999 call - emergency service personnel normally are required to attempt resuscitation or CPR if they are called, regardless of what the person's wishes might be.
- Advance Statement – including Assisted Dying (although in 2015 still currently illegal)
- Health and Welfare Lasting Power of Attorney (LPA) [NB An LPA for Property and Financial Affairs must be set up separately]
 - I have taken into consideration that making my Health and Welfare LPA after my Advance Decision would invalidate the Advance Decision
 - I have gained the agreement of the person / people to whom I am assigning Health and Welfare LPA (not legally required).
 - My Health and Welfare LPA is likely to outlive me. I review this regularly
 - I have signed the document, had it witnessed by an independent person (or relevant professional to ‘certify’ my application), have notified up to 5 people of my application, have registered the Health and Welfare LPA with the Office of the Public Guardian www.justice.gov.uk/about/opg, and paid for it.
- Organ donation
- Housing options (eg sheltered housing), residential and care homes
 - I have the following wishes:
 - I have made the following arrangements:

14. Funeral wishes

- Are you Jewish? YES / NO
- If Yes, where is the document that provides proof of Jewish Status?¹
 - *Ketubah*
 - Mother's *ketubah*
 - Proof of synagogue membership
 - Conversion certificate
 - Other
- Hebrew names
 - My Hebrew name
 - My parents' Hebrew names
- In the event of my death, I wish (name of prayer community) to make arrangements for my funeral.² YES / NO
- I have made my wishes clear to my next to kin. YES / NO

¹ Required by the Jewish Burial Society if you wish to be buried.

² Your prayer community may not in a position to guarantee that your wishes will be complied with. All that can be done is to attempt to help in facilitating the process during what may be a difficult and confusing time. Even if a synagogue will make the arrangements it is still possible for your prayer community to have a role, but you may need to make sure that the synagogue knows about this in advance.

- I have made my wishes clear to my other important person and/or key people in my Jewish community. YES / NO
- The person whom I would like my prayer community and/or synagogue to consult with.³
 - Name
 - Address (and postcode)
 - Landline
 - Mobile
 - Email
- I would like the following type of funeral (**select one only**)
 - A) Traditional funeral under the auspices of an orthodox synagogue (include name of synagogue organisation)
 - B) Traditional funeral under the auspices of the Jewish Joint Burial Society: Traditional / Reform / Liberal
 - Name of preferred person to officiate : ...
 - C) Chavurah funeral in conjunction with the Jewish Joint Burial Society
 - D) Cremation under the auspices of the Jewish Joint Burial Society
 - E) Funeral organised by members of the Chavurah: cremation / burial
 - F) Funeral organised by ... (named person): cremation / burial
- I have made arrangements for a Jewish funeral, burial, plot and headstone (include all details, including if you have pre-paid):
- I have made arrangements for a Woodland funeral, burial, plot and marker (include all details, including if you have pre-paid):
- Other format:
- I have the following special requests for my funeral⁴
 - Poems, readings
 - Who should speak
 - Music (crematorium only, or Woodland burial)⁵
 - Donations in my name to ...
 - Humanist or secular readings only
 - Other:

15. Will

- My copy of my will is located here: ...
- I have completed my Will and listed:
 - Lasting Power of Attorney for Financial and Medical, and back-up person(s)
 - Custody of child(ren) and back-up person
 - Distribution of assets and personal items
- The will is signed, notarized, and a copy has been given to those listed.

³ It is impossible to anticipate all eventualities so provide the name of a person you trust to help. This person might be someone who knows your wishes but could also be someone who knows how to contact “out of towners” quickly, is aware of friends or family who would wish to know about arrangements, etc.)

⁴ Include the texts on separate sheets.

⁵ Include sheet music and / or recordings

- I have done the following with the Executor(s) of my will (none of which is legally required, but may be wise to do anyway):
 - Obtained their consent to be my Executor(s)
 - Informed them that I have named them as Executor(s)
 - Discussed/shared the contents of my will with my Executor(s)

16. Personal

- I have thought about my relationships and how I want to move forward to resolve any unfinished business
- I have reached out to those people
- I have deeply considered how my life lines up with my values and priorities, how I am spending my energy, and what I want to do differently to have the life that is meaningful and important to me
- If I haven't completed these at my death, I would love if someone was able to do the following: ... (eg collate and publish poems or writings, collate blog offline and make more widely available, record my songs)
- Ethical Will
 - Thank you to ...
 - Sorry to ...
 - I forgive ...
 - I love you ...
 - Lessons I have learned and would like to pass on
 - Other reflections