



Getting Your Ducks in a Row

.....

Next Steps to Getting Your Ducks in a Row

- ☐ Familiarize Yourself with Coverage Options
- ☐ Create a Will/ Revocable Trust
- ☐ Designate a Health POA
- ☐ Designate a Financial POA
- ☐ Determine Advanced Directives
- ☐ Confirm beneficiaries on all accounts and insurance policies
 - ☐ Notify beneficiaries
 - ☐ Notify charitable organizations of your intentions
- ☐ Communicate your wishes to your family
- ☐ Create a “Box” to keep all your important documents
- ☐ Understand and explore care options
- ☐ Explore opportunities for professional or community support