

9 End of Life Planning Documents

to establish your medical & financial wishes

WHO'S INVOLVED

DOCUMENT TYPE



YOU



THIRD PARTY



WITNESS /NOTARY



MEDICAL PROFESSIONAL



BENEFICIARY



MEDICAL



FINANCIAL /PERSONAL

Living trust

Transfer your assets into a living trust managed by yourself or another trustee, and name successor trustee(s) to take over if you die or are incapacitated. After your death, assets in the trust are distributed to your beneficiaries as indicated.

✓ active when signed (powers transfer at incapacitation)



The best time to get your affairs in order is when you reach financial security and are in good health.

Organ & tissue donation

Register to become an organ and tissue donor at organdonor.gov or with the DMV

✓ active when signed



ADULTHOOD

60%

of terminally ill patients do not recall discussing end-of-life choices with their doctor

Financial power of attorney

Select an agent (attorney-in-fact) to make financial decisions on your behalf. The agent's powers begin as indicated by the document, and end at your death or when you revoke the document

✓ active as indicated in the document



INCAPACITATION



An incapacitated person is unable to make or communicate responsible personal decisions due to dementia, coma, or a number of other impairments.

Personal and financial records

File important documents (like your property deed, bank account info, and birth certificate) in one place, and share the location with a trusted person in case of emergency



Living will

Indicate how much and what type of **life-sustaining treatment** (like CPR or intubation) you would like to receive in a life-or-death situation

✓ active at incapacitation



DNR (Do not resuscitate)

Declare your wish to **not receive resuscitation** in the event of cardiac or respiratory arrest. This form must contain physician and patient statements

✓ active at incapacitation



Medical power of attorney

Designate a trustworthy agent (proxy) to make medical decisions for you **only after** you're incapacitated

✓ active at incapacitation



AFTER DEATH



Make things easier on yourself and your loved ones by documenting your wishes ahead of time.

Last will & testament

Designate a trusted executor to administer your estate after your death. This document allocates your assets to your beneficiaries and assigns a guardian to your dependents

✓ active after death



Funeral plan & obituary

Indicate your burial/cremation plans and ceremony preferences, and write your own obituary if you wish. You can also allocate funds in a trust or last will & testament



Who's involved?



You

You have the right to decide what actions will be taken at the end of your life by filing the necessary documents.



Witness/Notary

Many states require legal documents to be signed by a notary or witnesses.



Third Party

Some medical and estate planning documents assign a trusted third party to make decisions on your behalf. Usually, an agent, attorney-in-fact, or proxy handles medical and financial decisions while a trustee or executor manages your estate after death.



Beneficiary

Estate planning documents allow you to leave behind assets to your beneficiaries and assign a guardian if they are dependents.



Medical Professional

Consult your doctor about common life-sustaining treatments so you can document your preferences accordingly, even if your doctor doesn't need to sign off on your decision.

Sources
<https://www.cdc.gov/aging/advancecareplanning/index.htm>
<https://www.consumer.ftc.gov/articles/0305-planning-your-own-funeral>
<https://www.nia.nih.gov/health/getting-your-affairs-order>

<https://www.nia.nih.gov/health/understandinghealthcare-decisions-end-life>
<https://pubmed.ncbi.nlm.nih.gov/18840840/>

PRESENTED BY:



Disclaimer: This infographic supplies general information about end of life planning documents applicable to most states. As specific legislation may vary, please check the laws of the state where you plan to execute your documents.