

GET A LIFE PLAN

Checklist

A life plan can be an important tool to help guarantee your care, medical, and financial needs are met during your life as well as ensuring that your body, money, and property are taken care of in accordance with your wishes following death.

Use the checklist below as a guide to help organize your life plan and gather the tools you need to put it into effect. Keep in mind that every tool on this list may not apply to your situation. Clicking a hyperlink will open the corresponding Oregon WINGS PDF document for download. Note that items with an asterisk require an attorney for assistance. We recommend sharing this information with others you trust if you need assistance.

☐ PREPARATION

Go to Oregon WINGS' **Get A Life Plan** page to review the following video for guidance and for further information:

- Video: <https://oregonwings.org/get-a-life-plan/>
- Guide: [“Start The Conversation”](#) with loved ones

☐ PLAN FOR YOUR ASSETS DURING YOUR LIFETIME

One or more of these tools can be used to help ensure your financial needs are met throughout the rest of your life, regardless of your condition:

- Guide: [Power of Attorney](#) *
- Guide: [Revocable Living Trust](#) *
- Guide: [Joint Accounts](#)

* Attorney assistance strongly recommended for these items

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☐ PLAN FOR YOUR MEDICAL DECISIONS

One or more of these tools will help to guarantee that your medical and care needs are met following your wishes, regardless of your condition:

- Guide: [Advance Directive for Health Care](#)
- Guide: [Appoint a Health Care Representative only](#)
- Guide: [Portable Orders for Life-Sustaining Treatment \(POLST\)](#)
- Guide: [Nominate a Guardian and/or Conservator](#) *
- Guide: [Declaration for Mental Health Treatment](#)

☐ PLAN FOR YOUR BODY AFTER YOUR DEATH

Consider how you would like your body to be cared for and laid to rest after your death. The following resource outlines your options and steps to ensure your wishes are honored:

- Guide: [Plan for Your Body After Death](#)

☐ PLAN FOR YOUR ASSETS FOLLOWING DEATH

One or more of these tools can be used to ensure that your money and property passes to those you wish to receive them:

- Guide: [Will](#) *
- Guide: [Revocable Living Trust](#) *
- Guide: [Joint Accounts](#)
- Guide: [Payable-On-Death Accounts](#)
- Guide: [Transfer-On-Death Deeds](#) *

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