



Resource: 10-Minute Document Checkup

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A quick review to reduce stress and make things easier for your family.

Step 1 — Do you have these key documents? (check one)

1. **Will** Yes No Not sure
2. **Enduring Power of Attorney (EPOA)** Yes No Not sure
3. **Personal Directive** Yes No Not sure
4. **Beneficiaries reviewed (pension/insurance/investments)** Yes No Not sure
5. **Funeral Preferences Identified** Yes No Not sure
6. **Emergency contact list** Yes No Not sure

Step 2 — Where are they?

Write where each item is stored (and how someone can access it).

- Will: _____
- EPOA: _____
- Personal Directive: _____
- Beneficiaries list / account notes: _____
- Funeral Preferences identified: _____
- Other important papers: _____

Step 3 — Who knows where to find them?

Choose at least two people.

- Executor / alternate executor
- Spouse/partner
- Adult child / close friend Names: _____

Step 4 — Quick check: are they up to date?

- Last review date: ____ / ____ / ____
- Life changes since then? (marriage, divorce, move, new child, death, new assets)
 No Yes (note): _____

Next step (pick ONE):

- Book a document review appointment (lawyer / planner)
- Update one document this month
- Tell my family where the documents are
- Start my Ducks in a Row booklet (coopmemorial.org/dir)