



# Resource: 10-Minute Document Check-Up

*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. **Beneficiary designations reviewed**  Yes  No  Not sure
- 5. **Funeral wishes written down**  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: \_\_\_\_\_
  - Enduring Power of Attorney: \_\_\_\_\_
  - Personal Directive: \_\_\_\_\_
  - Beneficiaries list / account notes: \_\_\_\_\_
  - Funeral Preferences identified: \_\_\_\_\_
  - Other important papers: \_\_\_\_\_
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### Step 3 — Who knows where to find them?

Choose at least two people and their phone numbers.

- Executor / alternate executor / personal representative: \_\_\_\_\_
- Spouse/partner: \_\_\_\_\_
- Adult child / close friend: \_\_\_\_\_

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

- Last review date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_
- Life changes since then? (marriage, divorce, move, birth/adoption of a 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 working on my Ducks in a Row booklet ([coopmemorial.org/dir](http://coopmemorial.org/dir))

Cooperative Memorial Society

[coopmemorial.org](http://coopmemorial.org) 403-248-2044 [admin@coopmemorial.org](mailto:admin@coopmemorial.org)