



First Steps of Advance Planning

While we cannot control our mortality, we can control how we prepare for it.

Organizing important documents, expressing our wishes, and having honest conversations can bring peace of mind to both our loved ones and ourselves. This resource will help you take the necessary steps to ensure that your affairs are in order, making difficult times easier for those you care about.

1. Start the Conversation

Use these prompts to begin meaningful discussions with loved ones:

- What was it like for you when someone meaningful in your life passed away?
- How would you like to be remembered?
- If you could determine your end-of-life experience on your own terms, what would it look like? (can include: where you would like to spend your time, your preferred meals, your celebration of life, etc.)

Take a moment to write three questions you want to ask your loved ones:

- _____
- _____
- _____

Need help getting started? Check out this conversation catalyst:

- "A New Way to Start a Difficult Conversation" Video & Article - keiro.org/deathdeckfeature

2. Consider Important Documents

- ☐ Advance Health Care Directive - Fill out one at keiro.org/ahcd
- ☐ Durable Power of Attorney (Financial)
- ☐ Living Trust
- ☐ Last Will and Testament
- ☐ Long-Term Care Insurance
- ☐ Self-Care Plan (identify your needs and a strategy to practice care for yourself, consider community resources and your personal support network)

3. Create Your Plan

This section is to help ease the process of advance planning by tracking your progress and setting your goals.

Set Deadlines:

- I will have conversations with loved ones by: _____
- I will gather all documents by: _____
- I will review and update my plan by: _____

Identify Support:

- I will stay accountable by sharing my deadlines with: _____
(e.g., friend, family member, legal advisor)
- I will share my plans, documents, and their storage locations with:

Reflection:

What challenges are preventing me from completing my plan?

- _____
- _____
- _____

What steps can I take this week to move forward?

1. _____
2. _____
3. _____

4. Check Out Additional Resources

- "An Act of Kindness to NOT Delay" Article - keiro.org/advcarefeature
- "Advance Care Planning" Fact Sheet - keiro.org/advcare
- "Advance Health Care Directives" Fact Sheet - keiro.org/directives
- For a list of estate planning legal services, visit keiro.org/directory and select "Legal Services - Estate Planning" under the "Type of Resource" dropdown.
- Community mental health resources and more:
 - Changing Tides - thechangingtides.org
 - OCAPICA - ocapica.org