

## Personal TO DO List

### A Summary of the Oct. 16 Seminar on Preparing for Death

- **Farewell Message** or private ceremony, sharing what brings beauty and meaning to your life, your life goals, and how you'd like to be remembered by people who have influenced your life  
[https://cgdoc.s3.amazonaws.com/Bob\\_Reid\\_Farewell.pdf](https://cgdoc.s3.amazonaws.com/Bob_Reid_Farewell.pdf)
- **Email list** of the people you want to receive your Farewell Message, saving loved ones from having to look through all your contacts and decide whom to notify about your death
- **Financial Power of Attorney** empowers someone to address financial issues if you're incapacitated  
[https://www.sbnm.org/Portals/NMBAR/forPublic/LREP/POA.pdf?ver=UP1\\_dLpg\\_Jy7Epl\\_C-A7Ng%3d%3d](https://www.sbnm.org/Portals/NMBAR/forPublic/LREP/POA.pdf?ver=UP1_dLpg_Jy7Epl_C-A7Ng%3d%3d)
- **Medical Power of Attorney/Health Care Directive** empowers someone to make decisions on your health care; tells relatives and doctors about procedures you do/do not want; often includes a HIPAA release  
[https://www.sbnm.org/Portals/NMBAR/forPublic/LREP/AHCD2014.pdf?ver=UP1\\_dLpg\\_Jy7Epl\\_C-A7Ng%3d%3d](https://www.sbnm.org/Portals/NMBAR/forPublic/LREP/AHCD2014.pdf?ver=UP1_dLpg_Jy7Epl_C-A7Ng%3d%3d)
- **HPPA Release** specifying who can help by accessing your health records if you become incapacitated  
[www.hipaajournal.com/wp-content/uploads/2017/09/HIPAA-Journal-sample-HIPAA-release-form-v1.pdf](http://www.hipaajournal.com/wp-content/uploads/2017/09/HIPAA-Journal-sample-HIPAA-release-form-v1.pdf)
- **What Are You Worth?** List of your financial assets, real estate, etc., consolidated as much as is possible
- **What Do You Value?** Summary of organizations or charities you'd like to support with these assets
- **Special Legacies** Plans you've developed to fund projects that allow your passions to live on after you
- **Legal Paperwork Empowering Above Intentions** including a will, trust, or other legal documents specifying how you want your assets allocated when you die, what items and funds you want to go to specific people, and what you want allocated to each organization, charity, or other legacy project
- **Emotional Legacy/Personal History** a memento helping loved ones know you better, perhaps thanking people who impacted your life, which could be a gift to friends and relatives on a birthday, or at death

**Resources:** <https://www.sbnm.org/For-Public/I-Need-a-Lawyer/Legal-Resources-for-the-Elderly/Publications>

<https://www.sbnm.org/For-Public/I-Need-a-Lawyer/Legal-Resources-for-the-Elderly>