LEGACY CHECKLIST

"Getting Your House in Order"

I. ADMINISTRATIVE MISSION PREP

- ☐ DD-214 / Discharge Papers (Essential for Military Honors)
- ☐ Current Life Insurance Policies & Beneficiary Designations
- ☐ Power of Attorney (Healthcare & Financial) Locations
- ☐ Digital Legacy: List of logins and social media preferences

II. LEGACY PROTECTION & VITAL DATA

- ☐ Vital Statistics & Demographics documented for next-of-kin
- ☐ Asset Documentation: Deeds, vehicle titles, and account info organized
- ☐ Will and Trust established and stored securely
- ☐ Advanced Planning scheduled and completed to lock in today's costs

III. SERVICE SELECTED PREFERENCE

- ☐ Traditional Service with Burial
- ☐ Service with Cremation Following
- ☐ Cremation with Memorial Service Following
- ☐ Direct Cremation
- ☐ Selection of 'Final Salute' or Military Honors

NOTES & STRATEGIC OBJECTIVES

Grace & Mercy Funeral Service, P.C.
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