

# You've Worked Hard for Your Money...

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**Don't Leave**

Without Communicating Your  
Wishes About **Finances**,  
**Medical Care** and other  
**Final Arrangements**

**USC** Center for  
Work & Family Life

# 8 Actions You Should Take Right Now

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## 1. UPDATE YOUR EMERGENCY CONTACT INFO ON USC'S E-TRAC WEBSITE

More info at <http://ais-ss.usc.edu/>

## 2. ORGANIZE YOUR RECORDS

You'll need these for the legal documents mentioned in the steps that follow  
More info at this AARP site: <http://bit.ly/QGrrdc>

- Bank statements
- Birth certificates, marriage licenses, divorce decrees, passports, education records, military service records
- Burial plot or policy information
- Credit card records
- Household inventory
- Insurance, life
- Insurance, car, home, etc.
- Investment statements
- Investment certificates
- Loan documents
- Real estate deeds
- Social Security card
- Social Security statement
- Vehicle titles
- Will

## 3. CREATE A WILL OR FAMILY TRUST DOCUMENT

- Consult an attorney or create your own

USC offers a Group Legal Plan to reduce costs for services such as these;

[http://www.usc.edu/dept/Benefits/fi-legal\\_services.html](http://www.usc.edu/dept/Benefits/fi-legal_services.html)

Or create your own using the "Five Wishes" document at <http://www.agingwithdignity.org/>

## 4. COMPLETE AN ADVANCED DIRECTIVE FOR HEALTH DECISIONS

Can be addressed in your will or "Five Wishes" document

Or create your own at <http://www.caringinfo.org/files/public/ad/California.pdf>

- Name your representative to make healthcare and medical decisions if you become incapacitated
- Give preferences for pain management
- Give preferences for Do Not Resuscitate (DNR) and Do Not Intubate (DNI)
- Give preferences for organ donation

## 5. COMPLETE A DURABLE POWER OF ATTORNEY DOCUMENT (DPOA)

Can be addressed in your will or "Five Wishes" document

- Name your representative to make financial decisions if you become incapacitated

## 6. UPDATE YOUR BENEFICIARY INFORMATION ON ALL OF YOUR ASSETS

- This step directs your funds to the person(s) of your choice, rather than the courts deciding for you
- Update beneficiary info on your Life Insurance plans
- Update beneficiary info on your Investments, 401(a) and 403(b), TIAA-CREF

## 7. CREATE A LETTER OF INSTRUCTION

Learn more at this AARP site: <http://bit.ly/TgdV2c>

- Give preferences for your remains and/or burial
- Give preferences for memorial service or funeral

## 8. TELL OTHERS ABOUT YOUR PREPARATIONS

- Let family, friends, attorney know that you've made these difficult choices, and provide them with copies

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For individualized assistance or support, please contact the USC Center for Work & Family Life at:

213-821-0800 | [cwfl@usc.edu](mailto:cwfl@usc.edu) | [www.usc.edu/worklife](http://www.usc.edu/worklife)