You’ve Worked Hard for Your Money...

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

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

For individualized assistance or support, please contact the USC Center for Work & Family Life at:
213-821-0800 | cwfl@usc.edu | www.usc.edu/worklife