Our loved ones will have increased peace of mind knowing that there is a plan in place in the event of illness, incapacitation, or death.

1. Access to Important Information and Documents
   a. Make sure loved ones know the location of important documents.
   b. Develop an overview document clearly spelling out the contents and where documents are located.
   c. Have a separate document with a list of passwords to all your electronic accounts so these can be accessed. Keep this in a protected location, which can be online and/or on paper.
   d. Provide a list of resources and contact information for family members to consult for assistance.
   e. Ensure that a trusted person knows how to access important documents in case of an emergency.

2. Legal and Financial Planning (Estate Planning)
   a. Identify a trusted person to have power of attorney if you become incapacitated.
   b. Create a “living will” (advance medical directive).
   c. Prepare a certified last will and testament (if feasible, consider working with an estate attorney).
   d. As best you can, have adequate insurance coverage.
   e. Prepare other legal documents to ensure your family is protected if the unexpected occurs (e.g., a testamentary or non-testamentary trust).
   f. If you have financial savings or own property (e.g., a car or home), establish in advance who you want to manage your assets in the event you are incapacitated or not available.

Helping our families plan in the event of an incapacitating illness or death can be difficult to imagine. However, planning for such events can lower the stress of the unexpected. Good planning will help us feel that we are caring for those that we love.

Resources
https://www.americanbar.org/groups/real_property_trust_estate/resources/estate_planning/

Military-Specific:
Military OneSource. “Estate Planning.”

United States Army Judge Advocate General’s Corps. “Estate Planning Tool Kit for Military and Family Members.”