

ZEN HOUSEHOLD CLARITY TOOLS

# Final Expenses Planning Checklist

Identify immediate responsibilities without guessing a product or assuming a specific cost.

## Which responsibilities would someone need to handle?

- ☐ Funeral, burial, cremation, or memorial arrangements
- ☐ Travel or time away from work for family members
- ☐ Medical, household, or personal bills that remain
- ☐ Short-term housing, utility, or transportation costs
- ☐ Debts or obligations that require review
- ☐ Legal, estate, or administrative expenses
- ☐ Care for another person, pet, or dependent
- ☐ Another immediate responsibility

## Who would probably coordinate these responsibilities?

---

---

## What would you want that person to know ahead of time?

---

---

---

This checklist does not estimate local service costs or determine the amount of insurance needed. Actual costs and household responsibilities vary.

## FINAL EXPENSES | REVIEW PAGE

# What is already organized?

The existence of a resource matters less than whether the right person can locate and use it appropriately.

- ☐ A current beneficiary designation
- ☐ An individual or employer life policy
- ☐ Savings or a designated account
- ☐ Written service or memorial preferences
- ☐ A trusted person who knows where documents are kept
- ☐ Contact information for legal or financial professionals
- ☐ Nothing has been organized yet

## Which item should be verified or updated first?

---

---

---

## What should remain private, and who should know where to find it?

---

---

---

## The first final-expenses question I want answered is:

---

---

---

Keep completed copies secure. Do not place Social Security numbers, banking credentials, policy login information, or identification numbers on this worksheet.