

PREPAREDNESS PLANNING CHECKLIST

Turbulent times leave you feeling as though you are consumed by anxiety. By not having the proper estate planning, you are adding anxiety for yourself and your family. Below is a checklist for you to complete to help you prepare for, and thrive in, these unprecedented times. At Lacey & Lyons, Attorneys at Law, we will resolve your anxiety by providing a comprehensive estate plan. Give yourself peace of mind and schedule your estate plan review today, 321-608-0890.



LACEY & LYONS
ATTORNEYS AT LAW

Your Documents

Locate and gather all of your important estate planning documents.

Designation of Health Care Surrogate

Durable Power of Attorney

Last Will and Testament or Pour-Over Will

Revocable Living Trust (if one has been prepared for you)

Living Will or Advance Directive

Memorial Instructions

Memorandum or instructions regarding tangible personal property

Make sure all of your health insurance cards are in your wallet. If you cannot find your card, you may be able to print off a temporary card from your insurance company's website. You will also want to make sure a new permanent card is sent to you. Create a list that includes your current medications, medical conditions (past and present), and any other relevant health information.

Primary health insurance

Secondary health insurance

Prescription drug card

Pharmacy contact and list of medication, medical conditions, etc.

Locate the information on any short- or long-term disability insurance you have and review whether you would be covered if you contract COVID-19.

For Your Family

Write down your **child's schedule**, contact information for medical providers, and necessary information should someone need to take care of your child for a period of time.

Write down your **pet's schedule**, contact information for the veterinarian, and necessary information should someone need to take care of your pet for a period of time.

Create a one to **two-week meal plan**. Not only will this reduce the stress from the inevitable question of "what's for dinner?" and help you budget your money, it will also help you be more efficient when making your trip to the grocery store (or place an online grocery order!).

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For You

Compile a list of important contacts.

Doctor's office, Clergy and emergency contact phone number and address

The Human Resources Department or person at your company you would need to inform should you be diagnosed and not able to work

People you have recently been in contact with should you need to provide it to the Center for Disease Control

Make a list of books/movies/t.v. programs you would like to read/watch. If you have free time, you will feel better about having accomplished something, even if it means checking a book or movie off the list.

Call or video chat with family. Even though we are physically isolated, it does not mean that we can't spend time with our loved ones.

Don't panic. These are uncertain times but we are all in this together. It is natural to feel anxious, but we will get through this.



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