

Future Planning Checklist



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1. Create a Will

A will is a written plan that outlines how you want your belongings and money to be shared after you pass away. It ensures that your wishes are followed and can provide guidance for those you leave behind.

2. Create a General Power of Attorney

A General Power of Attorney is a legal document that allows one person to grant another person the authority to make decisions and take actions on the principal's behalf. Unlike an Enduring Power of Attorney, the authority granted under a General Power of Attorney usually ceases if the principal becomes mentally incapacitated.

3. Create an Enduring Power of Attorney

An Enduring Power of Attorney is a legal document that gives one or more individuals the authority to manage your financial and legal affairs. This can include managing bank accounts, paying bills, selling property, and making other financial or legal decisions.

4. Appoint an Enduring Guardian

An Enduring Guardian is a person you appoint to make personal, health, and lifestyle decisions on your behalf, such as where you live, the medical treatment you receive, or day-to-day care if you lose the capacity to make these decisions yourself.

NOT SURE WHERE TO START?



Check out our guide for more information on how to write a will here.

[HOW TO WRITE A WILL](#)



DISCLAIMER: The information in this PDF is for general guidance only and not legal advice. We strongly recommend consulting a qualified legal professional for specific needs and before making any related decisions. InvoCare accepts no liability for actions taken based on this content.

5. Appoint an Executor

An executor is a person named in a will who is given the legal responsibility to take care of a deceased person's remaining financial obligations. This includes managing the estate's assets, locating and contacting beneficiaries, settling debts and taxes, and following the instructions in the will to distribute the remaining assets to the named beneficiaries.

6. Appoint a Substitute Decision-maker

A substitute decision-maker is an individual or entity appointed to make decisions on behalf of another person who is unable to make those decisions for themselves. This inability might be due to mental incapacity, severe illness, disability, or other conditions that affect a person's judgement and decision-making abilities.

7. Complete a binding death nomination form

A binding death nomination form is a legal document used within certain types of retirement or superannuation funds. It allows a member of the fund to nominate specific beneficiaries who will receive the proceeds of the fund upon the member's death.

8. Advance care planning

Advance care planning is a proactive approach to your future medical needs. It empowers you to make key decisions about your healthcare before you might become unable to communicate your wishes. This process allows you to reflect on and document the treatments and outcomes that align with your values, ensuring that your loved ones and healthcare providers can honour your choices.

By creating an advance care directive and appointing a substitute decision-maker, advance care planning safeguards your autonomy, giving you control and peace of mind in managing your future health.

9. Prepare your send off

Planning your memorialisation or death rites in advance is a thoughtful way to alleviate future stress for your loved ones. By considering your preferences now, such as honouring cultural traditions, the type of event you envision, and how you want the ceremony to be remembered, you can make these important decisions without the immediate grief that follows a loss.

Understanding and recording your choices ensures that your final farewell will be meaningful and unique to you, free from the last-minute challenges of arranging details. Whether you're considering cremation or burial, weighing environmental considerations, seeking a funeral home package or something personalised, or deciding on the location and nature of the ceremony, early planning can turn a potentially overwhelming process into a thoughtful and memorable celebration of your life.

We understand that life's journey comes with its twists and turns, and planning for the future is a vital part of ensuring that your wishes and values are upheld. Whether it's arranging your memorialisation, setting up an advance care directive, or choosing a power of attorney, making these decisions ahead of time brings peace of mind to both you and your loved ones.

Our Future Planning Checklist is a comprehensive guide designed to walk you through each step of the process, allowing you to make informed and personalised choices. By taking control of these significant life decisions now, you can focus on living fully in the present, knowing that your intentions for the future are clearly laid out and secured.

Start your journey of thoughtful planning with our Future Planning Checklist, and embrace a future where your choices reflect your life, your values, and your legacy.



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