LEGACY PLANNING Checklist

- [ ] Gather important documents
- [ ] Appoint Financial Power of Attorney
- [ ] Name a Healthcare Agent
- [ ] Complete advanced healthcare directives
- [ ] Make or update your will
- [ ] Make or update your living trusts
- [ ] Review and identify current beneficiaries
- [ ] Consider charitable gifts

Complete a Declaration of Intent if you've included Foothills Compassionate Care

YOUR LEGACY IS MORE THAN WHAT YOU LEAVE BEHIND

A will or trust gives you the opportunity to make your wishes known, care for the people and causes that matter most to you, and leave a lasting reflection of your values.

MORE INFORMATION ON ESTATE PLANNING:

Foothills Compassionate Care | Hospice of the Foothills | Sierra Community Palliative Care | Foothills Gift & Thrift | Friends of Hospice | PLANNING FOR Good

11270 Rough and Ready Hwy. Grass Valley, CA 95945 | (530) 272-5739 | foothills-cares.org

This form is intended to be a personal-use tool and should not be interpereted as legal advice or legally binding.
Hospice of the Foothills, dba Foothills Compassionate Care | Tax ID 94-2674084