# B.O.L.D matters

*Be Bold - Get things done!*

## LEGAL MATTERS

- Do you have a will, a personal directive, and a power of attorney?
- Are these documents current?
- Do you have any specific wishes supplemental to the will?

## FINANCIAL MATTERS

- Do you have a financial plan for the present & future?
- Do you have your financial info organized (i.e. bank info, taxes, etc.)?
- Do you have a list of outstanding debt (credit cards, mortgages)?

## HEALTH MATTERS

- Do you have an advance care plan?
- Do you have a green sleeve and where is it stored?
- What about organ donation?

## ALL OTHER MATTERS

- Where are your passwords stored?
- Where is the information for memberships, clubs, etc?
- Who knows where this information is organized and stored?

## CONVERSATIONS THAT MATTER

- Does your family understand what is important for you at end-of-life?
- What unresolved conversations do you have?
- What do you think are the critical things that you need to talk about?

## A LIFE THAT MATTERS

- What makes you feel alive?
- What impact do you want to make?
- What do you truly value?

**WHAT ELSE MATTERS?**
**start the conversation....**

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