

# Get Your Shit Together Before & After Expanded Checklist

by Chanel Reynolds  
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# CHANEL REYNOLDS

*Author of What Matters Most  
Founder of Get Your Shit Together  
Co-founder GYST.com*



## What Matters Most

### *About the Book & Get Your Shit Together*

Authoritative yet personal, grounded but irreverent, Chanel's work has motivated millions of people worldwide to prepare for life's major curveballs and offers the candid, approachable, profoundly practical guide we all need. When her website launched in 2013, Chanel captured global media attention and the popularity of Get Your Shit Together led to her debut book **What Matters Most: The Get Your Shit Together Guide to Wills, Money, Insurance, and Life's "What-ifs"** (Harper Wave, March 19, 2019) which draws on her intimate personal experience, expert advice, and unparalleled resources.

**What Matters Most** blends intimate narrative with hard-earned advice and Chanel acts as your personal guide and expands and provides no-nonsense and no B.S. practical advice on:

- + Creating legal documents like a will and living will
- + Updating (or finally getting) a life insurance policy
- + Keeping track of online accounts and passwords
- + Starting or growing an emergency fund
- + Keeping secure, up-to-date accounts and passwords
- + How to help and what to do after life goes sideways

"Sometimes, we just need to meet the person in personal finance. Maybe, just maybe, hearing the story of someone who has been there, in the worst possible way, can finally push us all into action."

- Ron Lieber, *The New York Times*

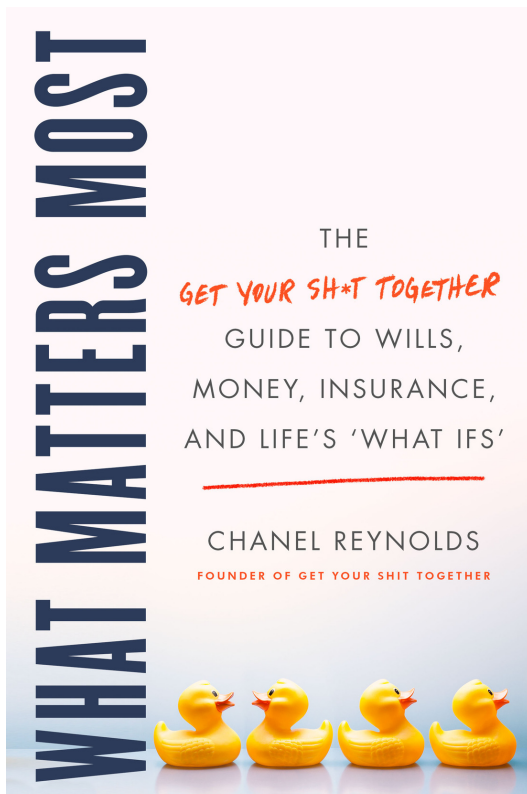
YOUR MONEY

*A Shocking Death, a Financial Lesson and Help for Others*



"Chanel Reynolds took her own unthinkable tragedy and turned it into a rallying cry - the time for keeping your head in the sand is over."

- Caitlin Doughty, bestselling author of *Smoke Gets in Your Eyes*



*“These preparations are not only pragmatic acts, but sacred gifts to our future selves and to those we love who will survive us. What Matters Most is a reassuring, step-by-step guide to a better future in the midst of grief and loss.”*

– **Katy Butler, author of *Knocking on Heaven’s Door* and *The Art of Dying Well***

“Grief is a monster better confronted without a legal, financial and logistical mess left behind; Chanel’s wisdom is a gift to all future dead people wanting to lift some of the burden of loss off their surviving loved ones. What Matters Most offers you the chance to consider, and find, those critical answers.”

– **Rebecca Soffer, coauthor of *Modern Loss: Candid Conversation About Grief. Beginners Welcome***

## Praise for Chanel

### *Conference Keynotes, Talks & Workshops*

“Everyone is still raving about your opening keynote, all the feedback from the conference says you were, by far, the favorite talk out of the whole event.” – **Conference Organizer, Motion Picture & Television Fund**

“Chanel answered our questions and advised us about the next steps we should all be taking to make sure our loved ones are not plunged into chaos. It might sound morbid, but it was actually really fun and inspiring. We signed, witnessed for each other and the notary stamped them all. We were done!” – **Holly, Seattle WA. Private event**

The course, dealing with hard, difficult and dark things, made these things bearable by the deft, smart and soulful navigation Chanel brought to the conversation. When the end of a hard journey is a new tenderness, a heart full of kindness and a sort of hopefulness for life grounded in the full acceptance of the full circle of life – including, even, the more mundane logistics – you know you have been on a worthy journey indeed. Beautifully done by a beautiful woman.” – **Michael B., Group workshop participant**



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*“If someone comes along and shoots an arrow into your heart, it’s fruitless to stand there and yell at the person. It would be much better to turn your attention to the fact that there’s an arrow in your heart...” – Pema Chodron*

## START WHERE YOU ARE

Three things that worry me most are:	Can I change this? Y / N
1.	
2.	
3.	

Three things that will be a relief to know/do/finish:	First step to complete this?
1.	
2.	
3.	

## 'BEFORE' CHECKLIST: PLANNING AHEAD

### WILL

#### My Will is

- Done (reviewed and/or updated in the last year)
- Drafted (actively in progress)
- Questionnaire complete
- Must Update (*that old one must be 'around here somewhere'*)
- On My 'To-Do' List

#### Power Of Attorney (POA)

- Power of Attorney: Executive
- Power of Attorney: Medical
- Power of Attorney: Financial
- Power of Attorney: Digital
- Power of Attorney: \_\_\_\_\_

#### Guardianship/Custody

- Custody of child(ren) (a permanent and perhaps temporary)
- Letter with wishes and instructions to Guardians with wishes, values, etc. (you can also make a video if that feels easier)
  
- Note: are there any additional 'conditions or provisions' for Custody (ex. a married couple still be married, stay in the same state, my brother can't smoke in the house...)

#### Pets

- Custody of Pet(s)
- Conditions or provisions for Custody (ex. household, walks, etc.)
- Letter with wishes and instructions to new caretaker/owner with wishes, instructions, etc.

\_\_\_\_ Note: it is important to many people to make sure family pet(s) are well taken care of, you can leave money specifically for this to a person to help with the costs on your pet's behalf - but name a person instead of the animal as the beneficiary to avoid confusion.

### Money/Assets/Stuff

- \_\_\_\_ Distribution of assets (*money, savings, property, jewelry, etc.*)
- \_\_\_\_ How Distributed (*lump sum, annual payment, 'when you graduate'*)
- \_\_\_\_ Debt Instructions
- \_\_\_\_ Trust (if one set up)
- \_\_\_\_ Trust (if set up)

### Burial, Funeral, Memorial

\_\_\_\_ Funeral, Burial, Memorial Wishes Letter (detail and include any pre-planning you have done, arranged or already paid for)

\_\_\_\_ *Note: you can leave very specific information, so if you want to be buried in that Elvis pantsuit or have ABBA's greatest hits playing – you should let us know.*

### Details & Logistics

\_\_\_\_ My Will is legally binding (check with your state but often this means signed in front of 2 witnesses and notarized) and a copy is with:

\_\_\_\_\_

A copy of my Will is located here (digital version or in a safe?):

\_\_\_\_\_

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## LIVING WILL/ADVANCE CARE DIRECTIVE

**My Living Will is** (often completed/updated with your Will):

- \_\_\_\_ Done (reviewed and/or updated in the last year)
- \_\_\_\_ Drafted (actively in progress)
- \_\_\_\_ Questionnaire complete

- \_\_\_ Must Update (*that old one must be 'around here somewhere'*)
- \_\_\_ On My 'To-Do' List

### **Medical Power of Attorney**

\_\_\_ My Medical power of Attorney (and back-up person) is informed of my wishes and we have discussed my instructions. (*if a Medical POA is listed in my Will, the names should match to avoid any confusion*)

### **Wishes, Directives and Instructions**

\_\_\_ I have defined what Quality of Life means to me and is included in/with my legally binding Living Will document.

\_\_\_ I have written a letter to my doctor to convey any additional information, wishes, and instructions.

\_\_\_ I have considered where and how I would like to be cared for if I were seriously or terminally hurt, ill, or injured discussed this with those closest to me:

\_\_\_ Discussed these wishes friends and family.

\_\_\_ Discussed with my Medical POA.

\_\_\_ Discussed with my doctor and/or medical team.

\_\_\_ I have reviewed my options, discussed and written my instructions about burial or cremation.

\_\_\_ Discussed and written down the type of funeral or memorial service I desire.

### **Details & Logistics**

\_\_\_ My Living Will is legally binding (check with your state but often this means signed in front of 2 witnesses and if not required then encouraged to have notarized) and a copy is with:

\_\_\_\_\_

A copy of my Living Will is located here (digital version or in a safe?):



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## DETAILS

Create a list of your important details and add/edit/delete as you need based on your life, it is a good idea to update frequently.

\_\_\_\_ I have listed my Personal Details out in case of emergency or someone else needs to retrieve it.

\_\_\_\_ I have detailed any products or services I am using that are holding, saving or storing any documents or details for me:

\_\_\_\_ Online services (i.e. Lastpass, Docusafe, Dropbox, etc.)

- 1.
- 2.
- 3.

\_\_\_\_ I have listed a Digital Power of Attorney in my POA document and on this form: \_\_\_\_\_.

\_\_\_\_ I have updated my account information and passwords to my online accounts on (date) \_\_\_\_\_.

A copy of my details list is located here: \_\_\_\_\_  
and/or (name) \_\_\_\_\_ has access.

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## MONEY

## Goals

- I have thought over and written down my financial goals.
- I have considered my personal values and the areas my spending and saving does (and doesn't) line up.
- I have researched tools, advice, resources, etc. to learn skills in the areas I have less experience to meet my goals.

## Budget

- I have completed a budget and track monthly actual costs to my budget (income & expenses).
- I have a plan in place to make steps towards my financial goals.

## Savings & Planning

- I have \_\_\_\_\_ weeks/months of expenses saved in case of accident or emergency in an emergency fund located \_\_\_\_\_.
- I have a short-term savings plan and put away \_\_\_\_\_% of my income each month towards financial priorities.
- I have a long-term savings plan and/or retirement plan where \_\_\_\_\_% of my income goes each month.
- I have reviewed my financial situation and, if necessary, discussed this with those closest to me.

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## INSURANCE

### Medical, Dental, Vision

- I have researched my current policy and am informed about new options or changes that may be in effect Jan. 1.
  - Medical
  - Dental
  - Vision
  - Other health care or savings options

### Auto/Home/Rent/Umbrella

- I have researched my current policies, compared prices and am informed about new options or updates I wish to make.

- \_\_\_ Auto
- \_\_\_ Home/Rent
- \_\_\_ Umbrella

### **Life, Disability, Long-term Care**

- \_\_\_ I have researched my options and compared plans for me and/or my family.
- \_\_\_ Life Insurance and completed all steps.
- \_\_\_ Short term Disability and completed all steps.
- \_\_\_ Long term Disability and completed all steps.
- \_\_\_ Long term care Insurance and completed all steps.
- \_\_\_ Riders that are options to possibly add to my plan(s).
- \_\_\_ Other types of insurance specific to me/my scenario.

A copy of my policies are located here: \_\_\_\_\_.

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### **GETTING MY SHIT TOGETHER**

- \_\_\_ I have a plan to get it done.
- \_\_\_ I will spend \_\_\_\_\_ minutes \_\_\_\_\_ on my plan per week/month.
- \_\_\_ I will track progress and my to-dos with/by \_\_\_\_\_.
- \_\_\_ I have clear goals to meet by the end of the year.
- \_\_\_ I have clear goals for next year.
- \_\_\_ I will celebrate each accomplishment, large and small.

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### **KEEPING MY SHIT TOGETHER**

- \_\_\_ I have discussed and shared my plans, wishes and feelings with those I care about.

\_\_\_ I have thought about my relationships and how I want to move forward to resolve any unfinished business.

\_\_\_ I have reached out to people I have been meaning to (or needing to).

\_\_\_ I have deeply considered how my life lines up with my values and priorities, how I am spending my energy, and what I want to do differently to have the life that is meaningful and important to me.

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CHECKLIST SUMMARY & TO-DOS

Fill in your to-do items below to update, complete or get stated from the big overview list above. No need to get overwhelmed, just a few things at a time...

Checklist Action Item	Next Step	Date to Complete

## 'AFTER' CHECKLIST: WHEN THE SHIT HITS THE FAN

### RIGHT NOW

- Are you clear about what the situation is, where you are, why?
- Are you in a good (enough), safe, or helpful place right now?
- Does someone know where you are, can come get you, or be with you?
  
- Who is with you and/or nearby that you can ask for help right now?
- Who do you want to have with you that you (or someone else) can call?
  - do you have those phone numbers?
  - can someone locate them and/or make those calls for you?
  - who else is on your 'needs to be called' list?
  
- Are your Family/Kids/Parents, etc. ok and in a safe place right now?
  - do you need to make a phone call to make any updates, buy time?
  - can someone locate them and/or make those calls for you?
  
- Is there anything that you want/need that could help you right now?

### WHAT NEXT

- Do you know what the next few days could/will look like
  - if yes, what is most important to handle/be done the next few days
  - if no, what are the likely if/then scenarios you can try to plan for
  
- Are there children or minors that need to be arranged for, where are they?
  - can you locate closest family, grandparents, parent, guardians
  
- Get a Notebook or Notepad to start writing down questions and info
  - What do you need/want to know, questions
  - Are there 'buckets' or 'categories' of things you can group together?
  - Are there items you can ask others to help with, or 'hand off'?
  - For example, ask for help with:
    - Kids and childcare scheduling, play dates, driving, etc.
    - Insurance claims and policies
    - Logistics for Out of town friends & Family,

- \_\_\_ Meal planning, grocery shopping and Food Delivery
- \_\_\_ Household help like laundry, cleaning, helping with pets
- \_\_\_ Money & Financial Planning, benefits, debts & settlements
- \_\_\_ Medical help, researching specialists, care options
- \_\_\_ Legal and Estate management, probate and settling estate
- \_\_\_ Communication Plan, online announcements, emails updates

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## PAPERWORK: LOCATE & COLLECT

- \_\_\_ Medical & Insurance Policies
- \_\_\_ Call Employer and/or Business contacts (they can often help)
- \_\_\_ Legal Issues & POA (locate Wills and/or Living Wills) contact POAs
  - \_\_\_ Financial
  - \_\_\_ Executive
  - \_\_\_ Medical
  - \_\_\_ other
- \_\_\_ Certificates & Documentation
  - \_\_\_ Birth certificates
  - \_\_\_ Marriage & Divorce
  - \_\_\_ Other (Military service, pensions, etc)

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## SERIOUS ILLNESS OR PREPARING FOR HOSPICE

- \_\_\_ Collect or create important documents (will, living will, POA, DNR, etc.)
- \_\_\_ Complete any missing documents or additional wishes
- \_\_\_ Financial Assistance Options (Disability Insurance or Benefits, etc.)
- \_\_\_ Share documents with family, doctor, hospital, hospice, etc.
  - \_\_\_ Wishes and desires (legal documents, letters, conversations)
- \_\_\_ Are there other assets to confirm or collect (safe deposit box, other?)
- \_\_\_ Are there details to document (accounts & passwords, online assets?)
- \_\_\_ Help contact friends and family members
- \_\_\_ If helping, reach out respectfully and offer help or check in
- \_\_\_ If helping, specific advice can be a relief (rather than “call me anytime”)

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## AFTER SOMEONE DIES

- \_\_\_ Notification of the death: if not in a Medical location or a doctor was not present - notify a Doctor, Police and/or Coroner
- \_\_\_ Organ donation (did they request it, is it possible)
- \_\_\_ Other 'upon death' instructions (DNA sampling, science, cryonics)
- \_\_\_ Ask for death certificates (certified copies) you'll need numerous copies
  
- \_\_\_ Care of the Body: choosing Cremation, Natural or Traditional Funeral 'disposition' Funeral & Memorial planning (any pre-planning or instructions)
  - \_\_\_ Is there a living will or letter expressing wishes?
  - \_\_\_ Moving the body: to a/your home, funeral home or crematorium, to a different state)
  - \_\_\_ Additional instructions/preferences: embalming options, clothing or shroud requests, special object(s) to be/remain with the body
  
  - \_\_\_ Invitations/requests to view the body and/or the cremation
  
- \_\_\_ Professional services to hire (independent funeral director, home funeral consultant, funeral planning/event service, select a funeral home or mortuary) to assist with planning, the process and/or funeral or memorial services. Specify:
  - \_\_\_ Home options include keeping the body home longer, a home viewing, wake, memorial and/or funeral
  - \_\_\_ Choosing cremation, direct cremation, natural burial, green burial, burial in a cemetery, family plot/crypt, burial at sea, or others
  - \_\_\_ Select a casket, shroud, box, urn, or other, if needed/desired
  
- \_\_\_ Plan the Wake/Memorial/Funeral/Ceremony and make as personal as any plans or instructions have requested or as specific as the family desires:
  - \_\_\_ List friends/family who can (or would like to) help with the service(s)
  - \_\_\_ Write an obituary, ask others to contribute, if desired
  - \_\_\_ Invitation list, invites via mail, email and/or other social channels
  - \_\_\_ Logistics with out of town guests
  - \_\_\_ Photos, music, food or other items to have present
  - \_\_\_ Confirm who to ask to speak, a celebrant, stories to share, etc.
  - \_\_\_ If helpful, ask a family member or friend to stay at the person's home to care for the house, pets, or help with logistics or visitors.

*Note:* You have more options than you might realize: if you want to have a home viewing of Uncle Hank in his favorite Elvis jumpsuit, have a green burial, serve only candy at the memorial and play CCR or ABBA nonstop – if that is what he and/or the family desire - then by all means Do It!

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## MANAGING & SETTLING THE ESTATE

\_\_\_ Confirm Executor of Will and get 'letter of administration' which confirms the 'Personal Representative' who can make decisions for 'the estate'

\_\_\_ if no will, Probate process confirms next steps and beneficiaries

\_\_\_ contact a lawyer if you have any legal questions or concerns

\_\_\_ Contact Services and Institutions (the "I'm Sorry for Your Loss" calls)

\_\_\_ Banking (checking, saving, retirement, stocks, etc.)

\_\_\_ Social Security Office (ask about Survivor benefits)

\_\_\_ Insurance providers (Life, Auto, Health, etc.)

\_\_\_ Mortgage, deed & titles to property

\_\_\_ Debt like loans or credit cards to make arrangements

\_\_\_ Utilities for home (change name, cancel or make updates)

\_\_\_ Post Office (forward address or stop mail, etc.)

\_\_\_ Financial Management of Estate (assets, debts, taxes, trusts, beneficiaries)

\_\_\_ Confirm instructions in Will for Assets, Trusts, Gifts, etc.

\_\_\_ Taxes to file and/or estate taxes to be paid

\_\_\_ Inventory Household items and Digital Assets as needed

\_\_\_ Collect all insurance policies and named beneficiaries

\_\_\_ Medical insurance status (continuation needed, COBRA?)

\_\_\_ Real estate if any property is still/currently lived-in (family, tenants)

\_\_\_ Inventory outstanding Debts (credit cards, mortgages, etc.)

\_\_\_ Does the debt(s) need to be paid (confirm before paying)

\_\_\_ Is the Personal Representative of the Estate held liable

\_\_\_ Digital Assets and Estate

\_\_\_ Online Password or Storage services known?

\_\_\_ Is there a Digital Power of Attorney listed in the Will or POA?

\_\_\_ Confirm if/who (Spouse, Executor of Will or other) will search online via sites, emails or other to secure digital assets.

\_\_\_ The Big Picture: Options, Vulnerabilities, Scenarios & Priorities

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## COMMUNITY & EMOTIONAL SUPPORT



\_\_\_ Remember, grief looks different for everyone, can 'take longer' than you think, come back or appear more like 'waves' than clear or linear 'phases'

\_\_\_ Put Your Mask on First: Taking care of yourself is a priority

\_\_\_ Get support for your emotional and mental health

\_\_\_ be honest about your feelings, talk about it

\_\_\_ be gentle with yourself, cut yourself a lot of slack

\_\_\_ plan for 'triggers', especially holidays and anniversaries

\_\_\_ get help, find a counselor, go to a grief support group



# PRIVATE SESSIONS

*Author of What Matters Most  
Founder of Get Your Shit Together  
Co-founder GYST.com*



## Working Together

Preparing a will or making estate plans can feel scary, confusing or overwhelming, but those tasks are much easier to face when you have help.

Working together, our sessions will guide you through a personalized step-by-step process to create and complete the tasks and to-do items most important to you and your family and get your legal, financial, and emotional planning priorities done!



## Personalized Support & Private Sessions

### **Get Started: Prioritize Tasks & Create a Plan**

90-minute planning session + create todo list (\$175).

- Goal: complete our session with your plan and checklist of clear and actionable to-do items.

### **Get It Done Plan: 4-Week Program**

Weekly 1-hr meeting + weekly task & todo list (\$350).

- Week 1: Legal & Estate planning documents
- Week 2: Financial planning & Insurance policies
- Week 3: Organizing accounts & contact info
- Week 4: Finalizing, saving & sharing your plan

### **Customized: 3-month, At Your Own Pace**

Three Sessions, 90-minutes each (\$450).

- Custom and ongoing support, updating tasks and priorities as needed during monthly meetings and check-ins via email.

### **Ongoing Help, Updates or Not Sure?**

1-hr meeting for ad-hoc or general planning (\$150).

"THE MOST DIFFICULT  
TIMES FOR MANY OF US  
ARE THE ONES  
WE GIVE OURSELVES."

PEMA CHODRON

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