



# WORLD TRAVELING CHECKLIST

Before you go on your next travel adventure, review the following checklist to make sure you, your loved ones, and your money and property are protected during your trip and afterward.

## PREPARING YOU AND YOUR LOVED ONES

- Create a packing list for each traveler
- Get refills on any medications for each traveler
- Print or save boarding passes to your phone
- Make sure everyone has a current passport: if not, renew passports ASAP!
- Find someone to care for or a facility to board your pets

## SECURING YOUR HOME

- Adjust thermostat settings
- Empty refrigerator
- Secure all doors and windows
- Clean the house
- Stop mail delivery or ask someone to collect mail and packages
- Arrange for property maintenance
- Arrange for someone to mow the lawn
- Arrange for someone to plow your driveway

## MANAGING YOUR PERSONAL AFFAIRS

- Meet with your financial advisor
  - Review account details
  - Review or complete beneficiary designations
  - Discuss how to access funds while out of country
  - Tell advisor who they can work with in an emergency (provide a copy of your financial power of attorney or complete your advisor's form)

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## MANAGING YOUR PERSONAL AFFAIRS (continued)

- Meet with your tax advisor
  - Discuss potential income tax consequences when staying in another country
  - Ask about duties and other fees associated with purchasing things in another country
  - Find out if there is a way to get a refund on taxes you may have to pay while in another country
- Meet with your insurance agent
  - Review or complete your beneficiary designation for life insurance
  - Review terms to see what activities could void your life insurance coverage
  - Discuss obtaining international health insurance
  - Assess whether you need travel insurance
- Meet with an experienced estate planning attorney
  - Create or update your existing estate plan
  - Make sure trusted decision makers have been selected for financial matters
  - Discuss who you want to make healthcare decisions for you, your end-of-life wishes and general medical preferences, and who you want to have access to your private healthcare information
  - Prepare proper documentation to give a trusted person the authority to care for your minor child while you are away
- Make your important documents accessible
  - Provide copies of your documents to your trusted decisions makers
    - financial power of attorney
    - medical powers of attorney
    - advance directive
    - HIPAA authorization forms
  - Store a copy of your medical documents in your suitcase
  - Share itinerary with close friends and family

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