

Planning Guide



Because you care enough to plan ahead for those you love

Using this planning guide to record your final wishes and organize life's many details assures that those closest to you have all they need to handle your affairs, recognize your wishes, and celebrate your life.

Your preparation today means greater peace of mind for loved ones later. As you complete this planner, know that you are giving your family a most thoughtful gift. This simple, caring gesture will help ensure a more meaningful tribute and provide comfort to those you love. Thanks to your actions today, the people you care about won't ever have to worry if they made the right choices.

Please let those close to you know about this document, and keep it in a safe place that is easily accessible. You may also want to provide a copy to a loved one who lives outside your home.

To my loved ones

It's out of pure and simple love that I leave you with this gift to guide and assist you through the period ahead.

My wish is to spare you any unnecessary expense and the burden of having to make decisions under pressure of time and emotion. That's why I have expressed my wishes and provided the



information you'll need to answer the many questions you'll be asked. I have also shared my personal thoughts and memories. May you find as much comfort and meaning in receiving these pages as I found in preparing them.

Signed _____

Date _____

Personal record

First name _____ Middle _____ Last name _____

Street address _____ City _____ State _____ Zip _____

Social Security number _____ Phone number _____ Years at address _____

Seasonal residence _____ City _____ State _____ Zip _____

Place of birth _____ Date of birth _____ Country of citizenship _____

Primary care physician _____ Phone number _____

Marital status Single Married Divorced Widowed

Maiden name _____ Spouse's name _____

Date and place of marriage _____

Father

First name _____ Middle _____ Last name _____

Father's birthplace _____

Mother

First name _____ Middle _____ Last name _____

Mother's birthplace _____

Education

Highest grade completed Elementary/Secondary (0-12) College (1-4 or 5+)

College/university names _____ Degree _____

Career

Occupation _____

Type of business/industry _____

Employer _____ Phone number _____

Military

Branch _____

Rank _____ Serial number _____

Location of military discharge papers (DD-214) _____

Date and place of induction _____

Date and place of discharge _____

Final arrangements

This sheet enables you and your family to know exactly which arrangements have been made and which ones remain to be determined.

OUTER BURIAL CONTAINER
Date Selected
—/—/—
INTERMENT RIGHTS
 Mausoleum Ground Burial
 Niche Cremation Garden
 Lawn Crypt
Date Selected
—/—/—

FUNERAL/MEMORIAL SERVICE
Date Selected
—/—/—
MEMORIALIZATION
Date Selected
—/—/—
CASKET/URN
Date Selected
—/—/—
OPENING AND CLOSING
Date Selected
—/—/—
TRANSPORTATION AND RELOCATION PROTECTION PLAN
Date Selected
—/—/—
PERSONAL PREFERENCES
 Flowers Readings
 Music Additional
Date Selected
—/—/—

Final wishes

Funeral home to contact _____

Name _____ Counselor/Advisor _____

Address _____ Phone _____

Funeral preferences

Place of service

Church Name _____

Funeral Home Name _____

Cemetery Name _____

Other Name _____

Person to officiate _____ Special instructions _____

Music selections _____

Readings _____

Obituary

Name of newspaper(s) _____

Name of website _____ Other _____

Visitation: Yes No Public Private

Casket: Open Closed

Final wishes *(continued)*

Final disposition

Earth burial Mausoleum entombment Cremation/Inurnment

Other (please specify) _____

Name of cemetery/mausoleum _____

Address _____ Phone _____

Description of burial property _____

Casket selection _____ Urn selection _____

Vault selection _____ Personalization choices _____

Permanent memorial

Type _____

Inscription _____

Flowers _____

Personal touches/items to display _____

Special services/ceremonies (fraternal, military, spiritual, etc.) _____

Personal instruction

Clothing _____ Stays on Return to family

Glasses _____ Stays on Return to family

Jewelry _____ Stays on Return to family

Other _____ Stays on Return to family

Religious items

Suggested memorial contributions _____

Pallbearers



Other requests

Financial information

Banking

Bank Name/branch _____

Type of account: Checking Savings

Username _____ Password _____

Bank Name/branch _____

Type of account: Checking Savings

Username _____ Password _____

Bank Name/branch _____

Type of account: Checking Savings

Username _____ Password _____

Credit cards

Visa Mastercard American Express Other _____

Account number _____ Expiration date _____

Username _____ Password _____

Visa Mastercard American Express Other _____

Account number _____ Expiration date _____

Username _____ Password _____

Visa Mastercard American Express Other _____

Account number _____ Expiration date _____

Username _____ Password _____

Financial information *(continued)*

Mortgage

Lender _____ Account number _____

Phone number _____ Location _____

Pension/Retirement plans

Company name _____ Account number _____

Phone number _____ Location _____

Company name _____ Account number _____

Phone number _____ Location _____

Company name _____ Account number _____

Phone number _____ Location _____

Company name _____ Account number _____

Phone number _____ Location _____

Company name _____ Account number _____

Phone number _____ Location _____

Company name _____ Account number _____

Phone number _____ Location _____

Financial information *(continued)*

Insurance (homeowners, health, auto, other)

Company _____ Agent _____

Phone number _____ Policy number _____ Beneficiary _____

Company _____ Agent _____

Phone number _____ Policy number _____ Beneficiary _____

Company _____ Agent _____

Phone Number _____ Policy number _____ Beneficiary _____

Company _____ Agent _____

Phone Number _____ Policy number _____ Beneficiary _____

Location of important documents

Safe deposit box location _____ Box number _____

Key(s) location _____

Birth certificate _____

Children's birth certificate(s) _____

Last will and testament _____

Funeral and cemetery arrangement documents _____

Real estate deeds _____

Income tax records _____

Auto registration/title _____

Other documents _____

Online profiles

List your email, social media accounts or other important login information

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Account name _____ Web address/URL _____

Username _____ Password _____

Other information _____

Please be sure to notify these people of my passing:

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Name _____

Relationship _____

Address _____

Phone _____

Email _____

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