

Funeral

I would like the following individual(s) to manage my final affairs regarding my funeral arrangements:

Please notify:

I would like to be laid to rest as followed: (cremated, buried, location, service, church, flowers, etc.)

If arrangements have been made and/or paid for:

My wishes for organ donation:

My wishes for memorial gifts:

Financial Affairs

I have a: WILL TRUST Notes: _____

My personal information is located: _____

(birth certificate, driver's license, will, trust, marriage license, etc.)

My delegate to handle my final requests and financial affairs: _____

My advisors (circle primary contact to assist in handling affairs):

Financial Advisor: (name) _____ (phone) _____ (firm) _____

Attorney: (name) _____ (phone) _____ (firm) _____

Accountant: (name) _____ (phone) _____ (firm) _____

Other: (name) _____ (phone) _____ (firm) _____

Important Contacts: (beneficiaries, executors, trustees, etc.)

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

(name) _____ (phone) _____ (address) _____

My tax returns can be found: _____

My insurance policies: (life, property, auto, etc.)

Type: _____ Firm: _____ Contact: _____ Phone: _____

Type: _____ Firm: _____ Contact: _____ Phone: _____

Type: _____ Firm: _____ Contact: _____ Phone: _____

Type: _____ Firm: _____ Contact: _____ Phone: _____

Type: _____ Firm: _____ Contact: _____ Phone: _____

My policies are located: _____

Beneficiaries: _____

Business Assets, Ownership & Wishes:

My Debts: (mortgage, loans, credit lines, others owed)

Type: _____ Firm: _____ Account #: _____ Phone: _____

Type: _____ Firm: _____ Account #: _____ Phone: _____

Type: _____ Firm: _____ Account #: _____ Phone: _____

Type: _____ Firm: _____ Account #: _____ Phone: _____

Type: _____ Firm: _____ Account #: _____ Phone: _____

Type: _____ Firm: _____ Account #: _____ Phone: _____

My statements are located: _____

Online Access to Account Information

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

Firm: _____ Website: _____ Login: _____ Password: _____

My cell phone password: _____

My computer password: _____

I keep my financial records:
