

SHARING YOUR FINAL WISHES

UNDERSTANDING WILLS AND
FINAL ARRANGEMENTS

INCLUDES:

PERSONAL INFORMATION
THINGS TO CONSIDER
FAMILY CHECKLIST
FINAL ARRANGEMENTS
ONLINE INFORMATION



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YOUR LEGACY

ON YOUR TERMS



WILLS AND FINAL ARRANGEMENTS

When you think about it, creating a will and making final arrangements are one more opportunity to show you care. You've lived life on your own terms, why shouldn't you leave a legacy on your terms?

If you die without a will, you are said to have died "intestate." Intestacy means state law will determine what happens to the property and assets you leave behind.

Your will is your opportunity to distribute your assets as you desire, whether that's gifts to charity, a comfortable retirement for your spouse, or a head start for children, grandchildren, and others who have been important to you.

FINAL ARRANGEMENTS: REDUCE THE BURDEN FOR A GRIEVING FAMILY

Documenting your wishes and final arrangements, often through something called a "letter of last instructions," can be one less burden for your family members as they are dealing with their grief. Putting everything in order before you pass on can help ensure your wishes are followed and leave less guesswork for those you leave behind. Including some vital information about yourself — your date of birth, hometown, occupation, degrees earned, etc. — can help your loved ones or funeral home write your obituary or death notice. You may want to discuss with your legal counsel where to store your letter of last instructions. Storing such information in a safe deposit box could be problematic if relatives are unable to access it immediately after your death.



You may want to consult a professional, such as an attorney, when creating your letter of last instruction and will.

We've provided a checklist you can fill out before taking a formal step with topics to help you get organized and thinking about what's important to you.

PERSONAL INFORMATION

Full Name

Address

City

County

State

Date of Birth

Place of Birth (City)

County

State

Social Security Number

Education/Degrees

Occupation (Or retired from)

Employer

Physician(s) and Phone Number(s)

Are You a Veteran?

Yes

No

Serial Number

Enlistment Date Discharge Date

For help or advice in settling my affairs, please consult:

Name/ Phone

MARITAL STATUS

Never married

Married

Widowed

Divorced

Spouse or Maiden Name

Name of Father

Name of Mother (Maiden)

THINGS TO CONSIDER FOR A WILL

Who do you want to be appointed as executor of your estate?

- Husband/Wife Son/Daughter Relative Attorney None

Name

What instructions do you have for real estate holdings?

What personal effects do you wish to give and to whom?

| | |
|------|---------|
| Item | To Whom |
|------|---------|

| | |
|------|---------|
| Item | To Whom |
|------|---------|

| | |
|------|---------|
| Item | To Whom |
|------|---------|

| | |
|------|---------|
| Item | To Whom |
|------|---------|

Where do you keep the following financial and personal records?

Will, Living Will, Power of Attorney, Letter of Instructions

Insurance Policies

Pension, Annuity, 401(k), IRA, Other Retirement Accounts

Bank and Credit Card Information

Tax Records

Mortgage Information

Social Security Card, Birth Certificate, Marriage Certificate, Divorce Judgement, etc.

Vehicle Titles

Location of Valuables (And Access Information)

Additional Information

FAMILY CHECKLIST

BEFORE THE FUNERAL ...

NOTIFY:

- Attorney
- Business Associates
- Cemetery
- Florist
- Fraternal Organizations
- Friends
- Funeral Director
- Minister/Church
- Obituary
- Organist/Soloist
- Relatives

AFTER THE FUNERAL ...

NOTIFY:

- Accountant
- Financial Institutions
- County Recorder
- Credit Cards
- Department of Motor Vehicles
- Insurance Agents and Companies
- Medicare
- Military Pension
- Post Office
- Social Security
- Union
- Utility Companies
- Veteran's Organization

FINAL ARRANGEMENTS

Name of Funeral Home

Name of Church

Name of Cemetery

Burial or Cremation

Casket or Urn Preference

Burial Clothing

Jewelry

Other Instructions

Reserved Facilities, Plots, or Preneed Contract?

If Yes, Provide Details, Contact

Special Readings, Music, Songs

Special Ceremonies (military, fraternal order, etc.)

Pallbearers

Inscription

Send Donations To

Special Instructions



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ONLINE INFORMATION

DEPARTMENT OF VETERANS AFFAIRS

va.gov

SOCIAL SECURITY ADMINISTRATION

ssa.gov

CREMATION ASSOCIATION OF NORTH AMERICA (CANA)

cremationassociation.org

INTERNATIONAL CEMETERY, CREMATION AND FUNERAL ASSOCIATION

iccfa.org

THE NATIONAL FUNERAL DIRECTORS ASSOCIATION

nfda.org

MEDICARE

medicare.gov

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

hhs.gov

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