

# FINAL WISHES

ORGANIZER



*Schaudt*  
FUNERAL & CREMATION

# Benefits of Planning Ahead



Advance Planning is a way of sharing your story, caring for your family, and creating an event that will be cherished in their memories.

Making the choices for your family in advance gives them the comfort of knowing that the ceremony is perfectly in accordance with your wishes. This unique opportunity allows for you to tell your story the way you wish and gives the gift of your legacy to your family and friends.

People who make their plans in advance alleviate the financial weight of funeral costs, take care of most of the decision-making, give certainty that your wishes are being honored and most importantly, your family is given the time and space to simply be together.



[schaudtfuneralservice.com](http://schaudtfuneralservice.com)

866-746-CARE



# Starting The Conversation

Now is the time to have the conversation, not when you are in crisis. Bringing your family together for an honest conversation about your plans and wishes is the first step. We consistently see families who take this walk together have greater peace of mind.


Advance planning is about leaving well, and it's about documenting and sharing your plans with those who are most important to you.

- If you feel awkward starting the conversation, then acknowledge how you feel: "I have something on my mind that is sometimes uncomfortable to talk about, but I feel we need to."
- Many people who are sick care very deeply about not causing their family members pain or anguish. But the truth is, talking about funeral or memorial ceremony options makes it easier for families.
- Planning ahead is also perceived as a way to remain in control, even at the end, by writing down detailed funeral plans. When so many people can feel powerless, handing them the ability to finalize their wishes can be very empowering and peace-giving.

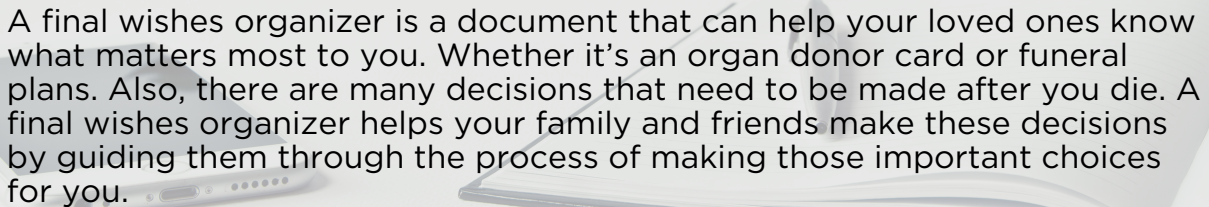
An Advance Health Care Directive (AHCD) is a very important document to have completed in addition to a detailed funeral plan. Why? Because at the time of need, some family members may not agree. If all the paperwork is complete and available, then there is no question about what will be done. We recommend that you keep several copies of your AHCD and distribute them to family members, as well as your doctor, local hospital, and your trust attorney. Your funeral arranger will have a copy of your funeral plan on file at the funeral home.



# The Final Wishes Organizer



The Final Wishes Organizer simplifies everything for your family. Instead of making decisions and wondering what you might prefer. They hold the gift of your thoughtfulness and choices in their hands. The final wishes organizer includes a set of questions that you can ask yourself to figure out what's important to you and have your loved ones know it after you are gone.



A final wishes organizer is a document that can help your loved ones know what matters most to you. Whether it's an organ donor card or funeral plans. Also, there are many decisions that need to be made after you die. A final wishes organizer helps your family and friends make these decisions by guiding them through the process of making those important choices for you.

## All About the Final Wishes Organizer

The final wishes organizer is in two parts: Part I contains the plan for after death; Part II holds details on funeral plans.

Part I of the final wishes organizer is a planning document for your death.

It has questions that will help you think about what you would like to have happened after you die. The answers will help your loved ones know what matters most to you. Whether it's an organ donor card or funeral plans, Part I is part of the final wishes organizer where all this information goes.

Part II of the final wishes organizer is a guide for making decisions now so that there will be less to worry about after death.

After writing down everything in Part I, use Part II to keep track of any other important issues such as who takes care of your children if you die before they become full-time adults (if this concerns you). Or who will pay your bills or take care of your pets. There is also a section in Part II that helps decide what to do with things you might want to give away, like the house you would leave to your children.

A final wishes organizer can be very helpful and give much peace of mind to family members. You can make a copy of this final wishes organizer for each member of your family so family members have everything at hand when they are making decisions after you die. It's a good idea to have several copies made so people can keep them current as changes occur in their lives and other details are added. Putting this information together in one place may seem too overwhelming now, but it's really worth it.





# How to Organize and Share Your Wishes



***Organize***

The final wishes organizer has questions about your preferences, opinions and feelings on a variety of topics regarding life, death and afterlife. The questions go into detail to help you think through the issues that are most important to you. Topics include who will take care of your children if you die before they grow up full-time (if this concerns you) and what is the name of your church or building where you want to be buried.

You can make a list of people who would be important in your last days. Write down any final messages you want to pass on, or choose the music you want. You can also set up email alerts for things like blood pressure readings and weight changes which will help remind loved ones to take care of each other during difficult times.

The Final Wishes Organizer brings into one place all of the important documents and decisions that pertain to your final wishes. When thoroughly completed, this organizer will contain about 95% of all the information necessary to make funeral arrangements and will be one of the most valuable documents you or your family could ever have.





# Frequently Asked Questions



## **Can you put funeral wishes in your will?**

Including your funeral wishes in a will or trust does not mean that it is the only way to go. It's about deciding how you would like certain things done when you die. Usually, by the time this document has been found and read. Most of these decisions have already been made for us."

## **Are wishes in a will legally binding?**

A letter of wishes is drawn up alongside your final testament. Unlike many other countries where such documents are compulsory if an individual chooses their last words carefully enough. The wishes in a will are not legally binding. But, it can provide guidance for people who may be inheriting your estate.

## **What types of information should be included?**

The type of information that needs to be included depends on whether the document covers financial planning or just final arrangements such as burial, etc.

- Write down all the things that matter most to you. This could be specific information that will help people like a copy of your organ donor card or doctor's name, relevant phone numbers, or even funeral arrangements. Be sure to include all the information they may need for these decisions.
- Consider who might need this information in case something happens to you and how soon you want them to have it available. Asking someone too early might make them uncomfortable and vice versa.
- If possible, have the document notarized and ask multiple people to hold onto a copy in case of untimely death.
- Update your final wishes organizer as time goes by and if there is any change in your health or you become involved with an even more serious medical condition.

Read it over periodically to make sure it's up to date and complete so that you can pass on what is important to you.





# 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 \_\_\_\_\_





## Genealogy/Family

Use this space to record grandparents, siblings, spouse(s), children, step-children, grandchildren, etc.

Week	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							
30							
31							
32							
33							
34							
35							
36							
37							
38							
39							
40							
41							
42							
43							
44							
45							
46							
47							
48							
49							
50							
51							
52							
53							
54							
55							
56							
57							
58							
59							
60							
61							
62							
63							
64							
65							
66							
67							
68							
69							
70							
71							
72							
73							
74							
75							
76							
77							
78							
79							
80							
81							
82							
83							
84							
85							
86							
87							
88							
89							
90							
91							
92							
93							
94							
95							
96							
97							
98							
99							
100							



# 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

---

---

---

---

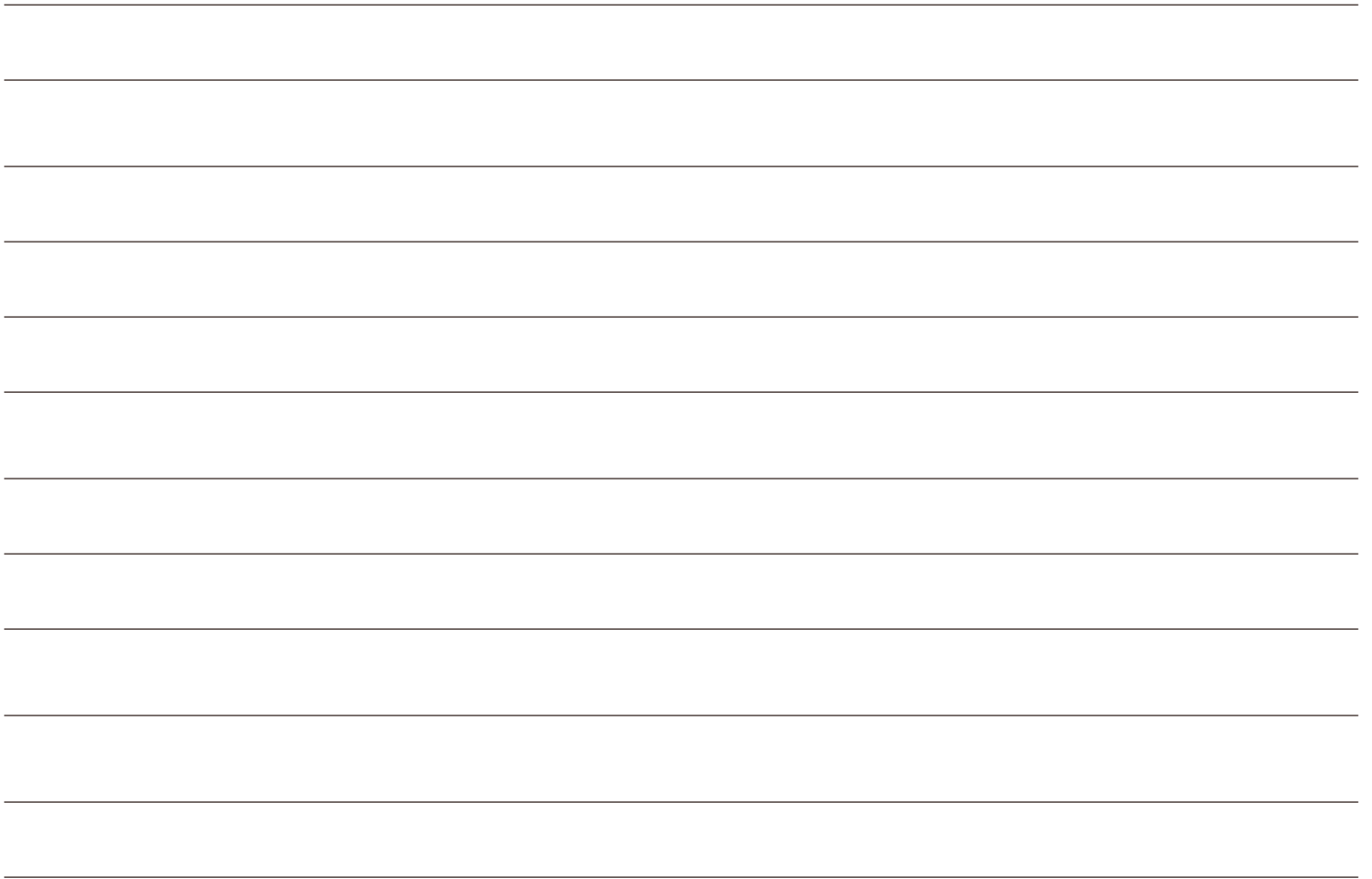
---

---

---

---



[illegible]

# 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

\_\_\_\_\_ Account number \_\_\_\_\_  
Lender \_\_\_\_\_  
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 \_\_\_\_\_



[illegible]

**866-746-CARE**

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 \_\_\_\_\_





## Dignity

Creating unique ceremonies that honor your loved one can be one of the first steps on the road of healthy grief.

## Care

We have been family owned and operated since 2002. We hold ourselves to the highest standards and promise excellence to every family we serve.

## Understanding

Adding that extra touch, watching over every detail, and caring for your loved one helps us bring you peace at this difficult time.



*Schaudt's*  
FUNERAL SERVICE & CREMATION CARE

OKMULGEE  
220 South Alabama Ave  
Okmulgee, Oklahoma 74447

Tel: 918.756.3300

TULSA  
5757 South Memorial Drive  
Tulsa, Oklahoma 74145

Tel: 918.523.5757

GLENPOOL - BIXBY  
1329 East 151st Street  
Glenpool, OK 74033

Tel: 918.291.1700

[schaudtfuneralservice.com](http://schaudtfuneralservice.com)