

# Final Wishes

## & P L A N N I N G K I T

### What's Inside ...

- "My Life. My Wishes." family keepsake
- "After a Loved One Dies" planning checklist

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PART 1 ...

# My Life. My Wishes.

A keepsake of cherished memories and final requests

Here you can record and share your life story with family and loved ones. Take your time, complete as much as you want – the parts most important to you.

In addition, you have a convenient place to express how you wish to be remembered after you're gone. There's even a place to record financial documents and other important information your family may one day need to handle your affairs.

Once you've completed filling this out, give it to a loved one or keep it with your other important papers.

This is a keepsake your family will appreciate and cherish for years to come.

**This information will be important for your family. It can help them get started and provide the details they'll need along the way.**

Name (legal) ..... (maiden) .....

Nickname .....

Address .....

City ..... State ..... ZIP .....

Date completed .....



# My Life. FAMILY

**Favorite memories of my family  
(parents and siblings)**

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**Where and how I met my  
spouse/significant other**

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**Favorite family traditions**

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**Favorite memories of my children as they were  
growing up**

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**Favorite memories of where I grew up**

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**My favorite family vacation memories**

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**Fondest memories of our family pet(s)**

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# My Life. PEOPLE, PLACES AND EVENTS

The most important person in my life as I grew up and why

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My favorite place(s)

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Schools I attended

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The best advice ever given to me, and by whom

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My favorite school memories

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One of the happiest moments in my life

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My favorite job ever, and why

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# My Wishes. FINAL ARRANGEMENTS

My services are preplanned. Contact

.....  
Name

.....  
Phone number

**My preplanning documents are located**

.....  
.....  
.....

My services are not preplanned. My funeral home preference is

.....  
Name

.....  
Phone number

I wish to be: Buried  Cremated

Burial wishes (e.g. cemetery, location, ashes)

.....  
.....  
.....

I have purchased a plot: Yes  No

My plot location

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.....

**My place of worship**

.....  
Name of church, synagogue, house of worship

.....  
Religious contact

.....  
Address

.....  
Phone number

**My memorial ceremony preferences** (e.g., wake, funeral mass, memorial service, rosary, graveside service, open/closed casket, no ceremony)

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.....  
.....

**Personal information for obituary** (e.g., military service, degrees, honors)

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.....

**Memorial contributions should be sent to** (e.g., favorite charities or organizations)

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# My Wishes. FINAL ARRANGEMENTS

**My favorite flowers**

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**Songs or music I like**

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**Special quotes or poems I like**

.....  
.....  
.....  
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**My favorite readings, psalms and prayers**

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.....

**Person(s) I would like to do the readings**

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**Memorial card:** Yes  No

**Other special notes or requests** (e.g., clothing, jewelry, personal items to be buried with)

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# IMPORTANT INFORMATION

## Personal

.....  
Date of birth

.....  
Mother's full maiden name

.....  
State and county of birth

.....  
Father's full name

.....  
Social Security number (or where it can be found)

.....  
Person who will handle my affairs/beneficiary

.....  
Education/degree

.....  
Phone number

.....  
Occupation

.....  
Attorney

.....  
Phone number

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Place(s) where I keep bank statements, deeds  
or other important financial records

My birth certificate, marriage certificate,  
divorce documents, military discharge  
papers, tax returns and other important  
documents are located

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# IMPORTANT INFORMATION

## Financial

I have a will or trust: Yes  No

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Location

The combination for my safe is known by

.....  
.....

I have a safety deposit box: Yes  No

.....  
Company name

.....  
Box number and location of keys

I have a life insurance policy(ies)

.....  
Insurance company

.....  
Location of policy

.....  
Insurance company

.....  
Location of policy

My beneficiary(ies)

.....  
.....  
.....  
.....  
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Other insurance policies I have (e.g., auto, homeowners/renters, health, dental)

.....  
Insurance company and type of coverage

.....  
Location of policy

.....  
Insurance company and type of coverage

.....  
Location of policy

.....  
Insurance company and type of coverage

.....  
Location of policy

.....  
Insurance company and type of coverage

.....  
Location of policy

I have a mortgage or deed to my home

Yes  No

.....  
Name of lender

I have a second mortgage on my home

Yes  No

.....  
Name of lender

I have an auto registration/title

Yes  No

.....  
Location of documents



PART 2 ...

# After a loved one dies

## A planning checklist

The death of a loved one is distressing, no matter if it's sudden or comes after a lengthy illness. At a time when families are grieving and emotions are running high, they can feel overwhelmed by the many decisions and plans that need to be made.

In the event you're faced with the loss of a loved one, you can use this checklist to help guide you through the steps that must be taken immediately, along with final arrangements you'll need to make in the days that follow.

Many final arrangements can be planned in advance – or preplanned – through a funeral home. By letting your wishes be known and preplanning your funeral, you can help ease the burden on your family when the time comes. If you decide to preplan, use this checklist as a guideline to help make sure your final wishes are carried out.



Use this checklist to guide you through the immediate steps to take and the final planning process following the death of a loved one.



# WITHIN A FEW DAYS

## General preparations<sup>2-3</sup>

- Find out if person had a prepaid funeral plan and/or individual life insurance policy
- Locate any estate-planning documents (will, trust, etc.)
- Gather vital statistics, personal information, military or veteran information, achievements and other highlights for obituary and eulogy
- Identify a charity donations can be directed to, if desired

## Funeral home arrangements<sup>1</sup>

Following are items you'll need to consider, whether you preplan or not.

A funeral home will walk you through your choices and help you with these details.

### Select a funeral home (if not already done)

- Choose the type of service (religious, military, fraternal, etc.)
- Make decisions about a wake, visitation and family viewing
- Select the location(s) of service or viewing
- Choose burial, cremation or entombment
- Select a casket or cremation urn
- Select a burial vault
- Select floral arrangements
- Select photographs for display and/or a memorial video
- Choose memento items to be displayed
- Select what the deceased will wear
- Identify jewelry that is to remain or be returned
- Select music, hymns and solos

- Select scripture or literature to be read
- Select a memorial register book
- Choose memorial folders and acknowledgment cards
- Determine transportation: funeral coach, clergy car, family limousine, pallbearer limousine, flower car

### Select participants

- Contact clergy, celebrant or officiant who will preside at service
- Arrange for organist, pianist and/or vocalist(s)
- Select pallbearers
- Select family member(s) and/or friend(s) to deliver eulogy
- Select family member(s) and/or friend(s) to read scripture or literature

# WITHIN A FEW DAYS

## Cemetery and burial location<sup>1</sup>

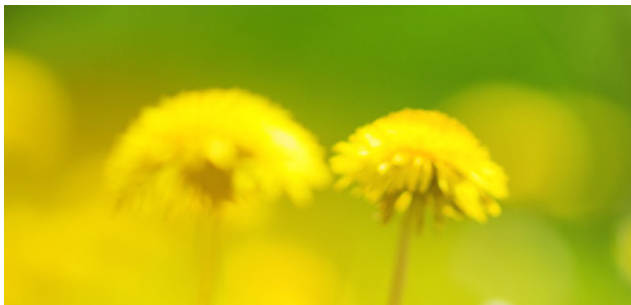
- Choose a cemetery
  - Decide on the type of cemetery (public, religious, municipal, veterans', etc.)
- Select a burial or cremation plot
- Select a memorial or grave marker and inscription

## Final arrangements at time of need<sup>4</sup>

- Set a time and date for the funeral
- Compose and submit obituary
- Arrange location and food for reception
- Apply for death certificates

## Miscellaneous<sup>2-5</sup>

- Cancel credit cards and driver's license
- Notify any banks, credit unions, mortgage companies and lenders
- Notify insurance companies
- If receiving Social Security, notify Social Security Administration (800-772-1213)
- Deactivate any social media accounts (check each platform's terms of service for specific rules and instructions)
- Cancel newspaper delivery and gather mail
- Send thank-you cards



While planning a funeral at a time when you're grieving can feel overwhelming, celebrating the life of your loved one can bring great comfort – along with knowing the love and memories you hold will live on.

### Sources:

1. "What Should I do When a Loved One Dies?" LifePlanLaw.com, March 2023
2. "Agencies to Notify When Someone Dies," USA.Gov, December 12, 2024
3. "What to Do After a Loved One Dies," Fidelity.com, 2023
4. "After a Death Occurs: A Checklist," LegalVoice.com, November 2024
5. "What To Do When Someone Dies," SSA.Gov, Accessed October 24, 2025

One of the kindest things  
you can do for your loved ones is  
*help protect them after you're gone.*



With modified whole life insurance, you can help ease the burden on your family. They can use it to help pay funeral expenses, medical bills, remaining debts or whatever they may need.



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