

# FAMILY MATTERS...



*Plan Ahead for Peace of Mind*

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# Family Matters...

Plan Ahead  
for  
Peace of Mind

**Life Has Brought Us**

**Through a**

**Multitude of Experiences...**

**However,**

When a loved one passes...  
We often find ourselves at a loss  
when we are called upon to handle final plans.

**Fortunately,**

The process of honoring a loved one is not  
complicated when there is a simple plan to follow.

**In Your Hands...**

Is an easy to use tool that can walk you, or your  
loved ones, through this experience with confidence,  
and an assurance that final wishes have been  
honored and handled with care.



# Family Matters...

## Life Insurance Can Help

with End of Life Expenses.

*This planner was completed by:*

\_\_\_\_\_

*on this date:*

\_\_\_\_\_

This booklet was completed with the hope that it would be a valuable reference tool when I am no longer able to answer the many questions that may arise when my final plans are being carried out. Understanding that this time of life will be difficult for those I love, I am attempting to lighten their burden by pre-planning.

Updated on: \_\_\_\_\_  
(Date)

By: \_\_\_\_\_

Updated on: \_\_\_\_\_  
(Date)

By: \_\_\_\_\_



# Family Matters...

## Life Insurance Can Help

with  
Cost of Living Expenses  
for  
Loved Ones Left Behind.

### *Personal Information*

Full Name, Address and Phone Number:

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Date of Birth and Birthplace:

Length of Time at Current Address:

Length of Time in the State:

Citizen of:

Employer's Name, Address and Phone:

Marital Status:

Name of Spouse: *(spouse's maiden name)*



# Family Matters...

Life Insurance Can Help

with  
Start-Up  
Businesses.

## *Personal Information (continued)*

Date and Place of Marriage:

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Father's Name and Birthplace:

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Mother's Name (maiden) and Birthplace:

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Social Security Number:

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### **VETERANS**

Branch of Service & Serial Number:

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Wars Served in:

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Organization & Rank:

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Place and Date Enlisted:

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Place and Date Discharged:

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Location of Discharge Certificate:

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# Family Matters...

Life Insurance  
Can Help

with  
College  
Educations.

## *Insurance*

### **LIFE - #1**

Company Name and Phone Number:

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Type of Insurance and Location of Policy:

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Policy Number and Amount of Policy:

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Insured's Name:

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Beneficiary's Name/s:

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### **LIFE - #2**

Type of Insurance and Location of Policy:

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Company Name and Phone Number:

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Policy Number and Amount of Policy:

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Insured's Name:

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Beneficiary's Name/s:

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# Family Matters...

Life Insurance  
Can Help

with  
Medical Bills.

## *Insurance (continued)*

MEDICAL - #1

Company Name and Phone Number:

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Group Number:

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Member Number:

MEDICAL - #2

Company Name and Phone Number:

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Group Number:

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Member Number:

*Insurance (continued)*



**Family  
Matters...**

**Life Insurance  
Can Help**

Loved Ones Keep  
Their Home.

VEHICLE

Company Name and Phone Number:

\_\_\_\_\_  
Policy Number:

\_\_\_\_\_  
Year and Make:

\_\_\_\_\_  
Year and Make:

\_\_\_\_\_  
Year and Make:

HOME OWNER'S

Company Name and Phone Number:

\_\_\_\_\_  
Policy Number:





# Family Matters...

Life Insurance  
Can Help

Keep Your  
Business  
Going.

## *Physicians*

### **PHYSICIAN**

Name and Type of Doctor:

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Address:

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Phone Number:

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### **PHYSICIAN**

Name and Type of Doctor:

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Address:

---

Phone Number:

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### **PHYSICIAN**

Name and Type of Doctor:

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Address:

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Phone Number:

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# Family Matters...

## Life Insurance Can Help

with Travel Expenses.

### Miscellaneous

Safety Deposit Box: *(Location and Access Instructions)*

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PINS/Passwords:

Email sites, banking, garage entry, computer sites, door entry, etc.

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Keys: *(Purposes and locations)*

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# Family Matters...

**Life Insurance Can Help**

Provide a Quality Education.

## *Who To Notify*

Church / Minister: *(Names & Phone Numbers)*

Family Members: *(Names & Phone Numbers)*

Friends: *(Names & Phone Numbers)*

Employer: *(Name & Phone Number)*



# Family Matters...

## Life Insurance Can Help

with Medical Bills.

### *Who To Notify (continued)*

Funeral Arranger: *(Name & Phone Number)*

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Cemetery and Funeral Home: *(Names & Phone Numbers)*

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Pallbearers: *(Names & Phone Numbers)*

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Doctor: *(Name & Phone Number)*

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Insurance Agents: *(Names & Phone Numbers)*

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Local Newspaper: *(Name & Phone Number)*

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Organizations: *(Names & Phone Numbers)*

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Executor of Estate: *(Name & Phone Number)*

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Attorney: *(Name & Phone Number)*

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# Family Matters...

Life Insurance Can Help

with  
Necessary  
Home Repairs.

## *Who To Notify (continued)*

Social Security Office: *(Phone Number)*

*If applicable*

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Others: *(Names & Phone Numbers)*

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# Family Matters...

Life Insurance Can Help

with Funeral Costs.

## *My Wishes For the Service*

**Service to Include:** *(Check all that apply)*

- \_\_\_\_\_ Viewing
- \_\_\_\_\_ Memorial Service (no casket at service)
- \_\_\_\_\_ Funeral Service with Open Casket
- \_\_\_\_\_ Funeral Service with Closed Casket
- \_\_\_\_\_ Graveside Service

Comments:

\_\_\_\_\_ **Place of Viewing:** *(Name, Address & Phone)*

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ **Place of Service/s:** *(Name, Address & Phone)*

-----**Funeral:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Family Matters...

Life Insurance Can Help

with  
Critical Illness Expenses

## *My Wishes For the Service (continued)*

Graveside: *(if applicable)*

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Speaker/s for Service: *(Name and Phone)*

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Organization/s Participating in Service: *(Name & Phone) - Military, Society, Lodge, etc.*

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Music

Song Title:

Sung By:

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Comments:

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*My Wishes For the Service (continued)*



# Family Matters...

## Life Insurance Can Help

with  
Gifts To Charities

**Life Pictures:**

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**Favorite Scripture Passage or Other Selection:**

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**What I Want Those Attending to Know:**

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**Special Instructions:**

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# Family Matters...

Life Insurance Can Help

with Life Honoring Memorials

## *My Wishes For Placement*

**Type of Arrangements:** *(circle one)*

Burial

Cremation

**Location of Placement:** *(circle one)*

Ground Space

Mausoleum

Comment:

\_\_\_\_\_ **Fun**

**eral Company:** *(Name, Address & Phone)*

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\_\_\_\_\_

\_\_\_\_\_

**Place of Burial / Remembrance:** *(Name, Address & Phone):*

\_\_\_\_\_

\_\_\_\_\_

**If Prearranged:**

Location of Certificate Showing Proof of Ownership:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



# Family Matters...

Life Insurance Can Help

with Personal Goals.

## *My Wishes for Placement (continued)*

### **Casket** (circle choice)

Metal                  Wood

Open                    Closed

Flag                    Casket Spray :  
(flower preference: \_\_\_\_\_)

Interior Color:

Exterior Color:

Pallbearers:

### **Urn** (circle choice)

Metal                  Wood                  Porcelain

Other:

Color:



# Family Matters...

Life Insurance Can Help

with Debt Reduction.

## *My Wishes for Placement (continued)*

### **Memorial** (Circle One)

Bronze                  Granite                  Other

Comment:

Inscription:

Special Instructions:

**Clothing:**

**Jewelry:** (Leave on or return to family)

**Glasses:** (Circle One)

Leave On                  Remove



# Family Matters...

## Life Insurance Can Help

### In Time of Financial Need.

## *Possible Benefits to Consider*

Below is a list of benefits that are sometimes available upon the death of an individual. It is important that these be evaluated in a timely manner, as time limitations often apply, and benefits may not be given automatically, but must be applied for.

### **Social Security Benefits**

You should contact the *Social Security Administration* office nearest you.

[www.ssa.gov](http://www.ssa.gov)

#### What to bring with you:

- Proof of Death (\*Death Certificate or documentation from funeral home - *Multiple copies will be needed.*)
- Social Security numbers for deceased and survivor/s
- Birth certificate of survivor
- Marriage certificate, if survivor was married to deceased
- Survivor's proof of US Citizenship or Lawful Alien Status
- Divorce papers for surviving divorced spouse
- Dependent children's Social Security numbers and birth certificates
- Deceased's most recent W-2 or Self Employment Tax Return
- Bank account number for depositing of funds

### **Veterans Benefits**

Contact the *Department of Veterans Affairs* office nearest you to determine current availability of benefits, or contact the office in Washington, DC.

[www.va.gov](http://www.va.gov)

#### What to bring with you:

- Veteran's Discharge Certificate or DD214
- Veteran's VA claim number or social security number
- Veteran's death certificate
- Government Life Insurance Policy
- Copy of all Veteran's marriage certificates and divorce decrees
- Copy of children's birth certificates or adoption documentation
- Veteran's birth certificate



## Family Matters...

### Life Insurance Can Help

with Peace of Mind.

## *Covering the Basics*

Below is a brief, general overview of a *Will*, *Living Will*, and a *Durable Power of Attorney*. To obtain detailed information that is appropriate for your state, you should contact an attorney, or your state's *Attorney General's Office*.

### **Will**

A will is a legal document that helps assure that your possessions will be dealt with according to your wishes after your death. Without this document, the government will step in and make these decisions for you, which could tie up your property and assets for an extended amount of time, as court proceedings progress. This could prove to be a real hardship on those you leave behind.

To prevent this from happening, a Will should be executed, at your earliest convenience. It is best to have your Will prepared by a competent attorney.

Upon completion, be sure and review your Will, regularly, to assure that it is current with your life changes and your wishes.

### **Living Will**

This document instructs physicians and family members of your desire to refrain from the use of extraordinary measures to prolong your life if you have a terminal illness or are in a vegetative state.\*

### **Durable Medical Power of Attorney**

Use this document to provide specific instructions about your treatment, and designate a person to make medical decisions on your behalf if you are unable to make them for yourself.\*

*\* Be specific when putting your wishes in writing and include your signature, a date, and notarize. Keep information in your wallet that informs of advanced directives and where they can be found. Provide copies to appropriate individuals; doctors, family members, etc.*



# Family Matters...

## Life Insurance Can Help

with  
Cost of Living Expenses for loved ones.

## *Paperwork Needed*

We live in an information age, and information remains a necessity, even at the time of death. We suggest that you collect the information listed below and place it in a secure location with this planner.

### Documents

### Location

- Birth Certificate \_\_\_\_\_
- Social Security Card \_\_\_\_\_
- Citizenship Documents \_\_\_\_\_
- Military Discharge Documentation \_\_\_\_\_
- Disability Paperwork \_\_\_\_\_
- Power of Attorney Information \_\_\_\_\_
- Marriage Certificate \_\_\_\_\_
- Certificates of Divorce/Separation \_\_\_\_\_
- Last Will and Testament \_\_\_\_\_
- Prearranged Funeral Plans \_\_\_\_\_
- Insurance Policies \_\_\_\_\_  
*(life, health, home & vehicle)*
- Children's Birth Certificates \_\_\_\_\_
- Income Tax Returns (last 2 years) \_\_\_\_\_
- Deeds to Property \_\_\_\_\_
- Mortgages & Notes \_\_\_\_\_
- Vehicle Titles – Bill of Sale \_\_\_\_\_
- Bank Accounts \_\_\_\_\_
- IRA's \_\_\_\_\_
- Pension Information \_\_\_\_\_
- Annuities \_\_\_\_\_
- Trust Accounts \_\_\_\_\_
- Stock Holdings \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

# **Family Matters...**

Your  
Picture  
Here

## *Personal Notes*

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