

Last Wishes and Preparation Kit



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See what's included...

My Wishes

A Collection of Treasured Memories and Last Wishes

This is a precious gift that your family will value and hold dear for many years. Utilize it to:

- Chronicle and pass on the story of your life to your family and friends
- Share your desires for how you want to be commemorated
- Document financial records and essential details that your family might need to manage your affairs in the future

After finishing the booklet, entrust it to a family member or store it alongside your significant documents.

Planning Checklist

During a period of sorrow and grief, the numerous decisions and arrangements that must be addressed following the passing of a loved one can be daunting.

This checklist provides a step-by-step guide for actions to be taken immediately following someone's death and details the final preparations necessary in the subsequent days.

Utilizing this checklist for preplanning your funeral offers a structured approach to ensuring that your last wishes are respected and implemented.

Questions? Give us a call at **(800) 998-7715**

My Wishes

This booklet serves as a unique repository for you to document and share the narrative of your life with your family and close friends. Feel free to take your time and fill out the sections that hold the most significance for you.

Moreover, it offers a dedicated space for you to articulate your desired legacy and how you want to be remembered. It also includes sections for noting down financial records and crucial details that might be necessary for your family to manage your affairs in the future.

After filling out this booklet, you can either pass it on to someone dear to you or store it alongside your vital documents.

This will become a treasured keepsake, valued and held dear by your family for many years.

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 _____

Family

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

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

Favorite family traditions

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

Favorite memories of where I grew up

My favorite family vacation memories

Fondest memories of our family pet(s)



People, Places and Events

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

Schools I attended

My favorite school memories

My favorite job ever, and why

My favorite place(s)

The best advice ever given to me, and by whom

One of the happiest moments in my life




Thoughts I leave with my family

What I hope people remember about me

What I'm most grateful for

Words of wisdom or advice





The insights, tales, and viewpoints you impart from your life's journey will be cherished gifts to your loved ones, treasured endlessly.



Final Arrangements

My services are preplanned. Contact

My preplanning documents are located

My services are not preplanned.

My funeral home preference is

I wish to be: Buried Cremated

Burial wishes (e.g. cemetery, location)

I have purchased a plot: Yes No

My plot location

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

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

Final Arrangements

My favorite flowers

Person(s) I would like to do the readings

Songs or music I like

Memorial card: Yes No

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

Special quotes or poems I like

My favorite readings, psalms and prayers



Final Arrangements

Other people or organizations I'd like to be notified (e.g., friends, doctor, clubs)

Name/Relationship

Phone number

Name/Relationship

Phone number

Name/Relationship

Phone number

Name/Relationship

Phone number

Name/Relationship

Phone number

Family notes (e.g., spouse, children and their spouses, grandchildren, siblings, preceded in death by, special mentions)

My beloved pets, special care instructions, and who I wish to care for them)



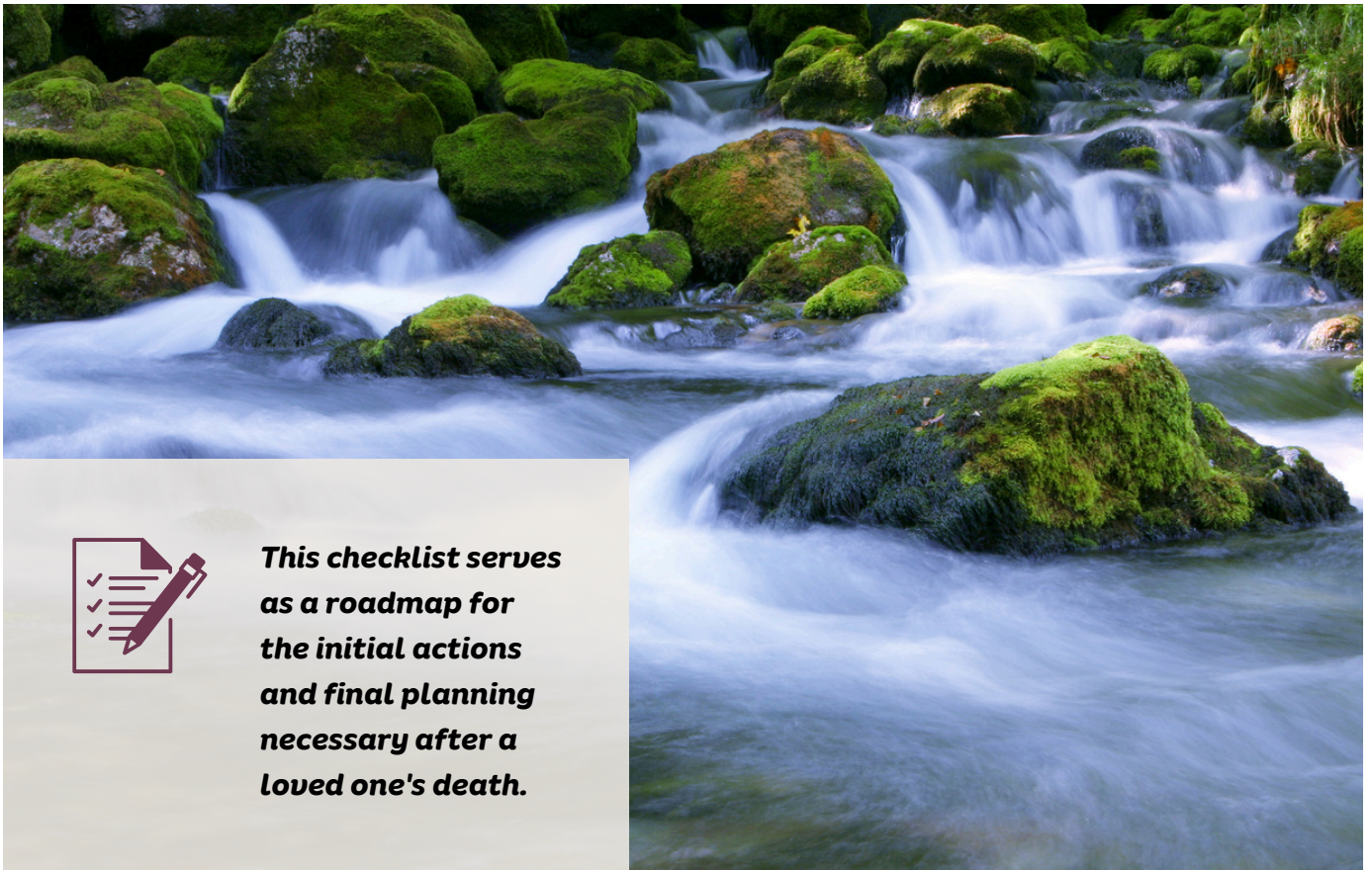
Planning Checklist

A helpful checklist for navigating the steps to be taken after the passing of a loved one

Planning Checklist

The passing of a loved one is always a profound and emotional ordeal, whether it occurs unexpectedly or after a prolonged illness. During such times of mourning, families often find themselves swamped with the numerous decisions and arrangements that need attention. Should you encounter the loss of someone close, this checklist is designed to assist you in navigating the immediate actions required, as well as the subsequent preparations for final arrangements.

It's possible to organize many of these final arrangements well in advance — a process known as preplanning — with a funeral home. By expressing your preferences ahead of time and preplanning your own service, you can significantly lighten the load on your loved ones when the moment arrives. If you choose to preplan, consider this checklist a comprehensive tool to ensure your final desires are fulfilled.



This checklist serves as a roadmap for the initial actions and final planning necessary after a loved one's death.

Immediately

General guidelines

- Get a legal pronouncement of death
- If death was expected and occurs at home under hospice care, call hospice nurse
- If death was expected and occurs at home without hospice care, call the person's doctor
- If death occurs at home and was unexpected, call 911 (medical team will help determine next steps and whether or not a coroner is needed)
- If death occurs in a care facility, attending staff will provide

Arrange for transportation of body

- If no autopsy is needed, call funeral home of choice
- If autopsy is needed, coroner will arrange
- If death occurs in a care facility, the staff will usually call the funeral home of choice, or, when needed, arrange for an autopsy

- **Call the person's doctor (if not already notified)**
.....

- **Notify close family, friends and clergy**
.....

- **Arrange for care of dependents and pets**
.....

- **Notify person's employer, if employed**
.....

- **Request information about benefits and any pay due**
.....

- **Ask if the person had life insurance through work**
.....

Notes:



Shortly After

General preparations

- 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

- 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

Shortly After

Cemetery and burial location

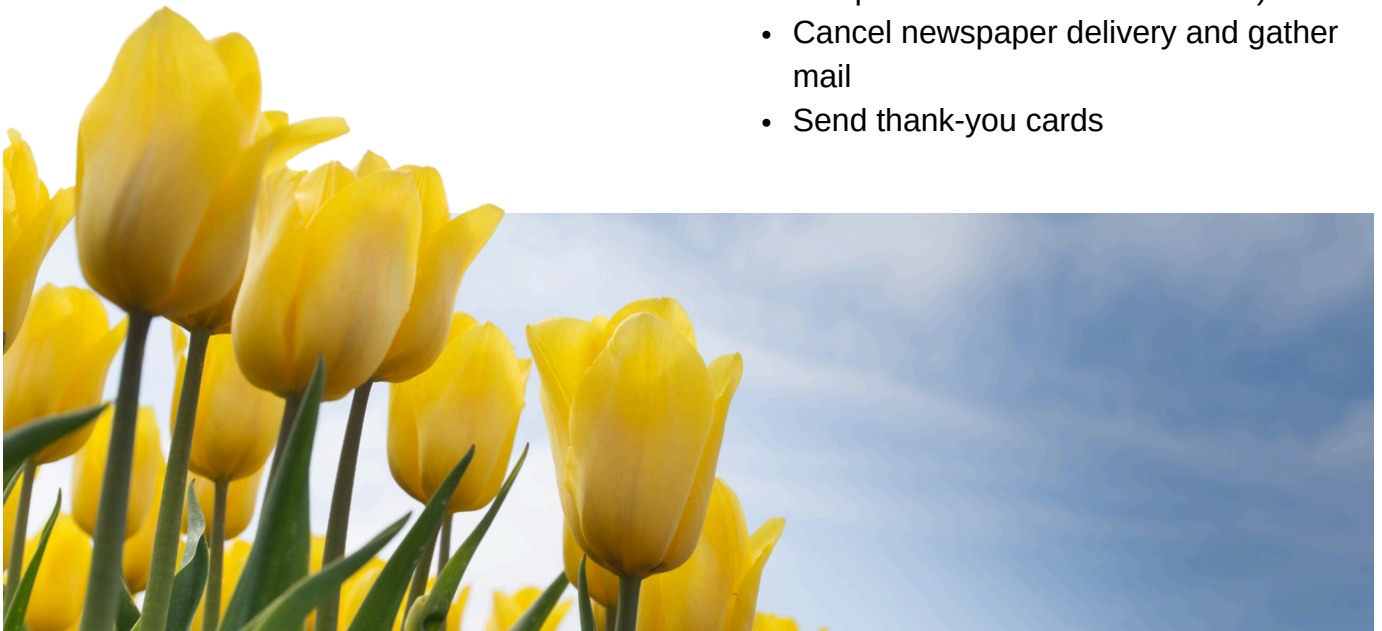
- Choose a cemetery
- Decide on the type of cemetery (public, religious, municipal, veterans', etc.)
- Select a burial or cremation plot
- Select a memorial or grave marker and inscription

Final arrangements at time of need

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

Miscellaneous

- 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





Life Insurance. Quick Quote Form

Agent Name: _____

Client Information:

- Full Name: _____
- Date of Birth: _____
- Gender: _____
- Contact Number: _____
- Email Address: _____
- Address: _____

Coverage Details:

- Type of Insurance (Term, Whole, etc.): _____
- Coverage Amount Desired: _____
- Term Length (if applicable): _____

Additional Information:

- Occupation: _____
- Annual Income: _____
- Health Status (Excellent, Good, Fair, Poor): _____
- Tobacco Use (Yes/No): _____

Beneficiary Information:

- Primary Beneficiary: _____
- Secondary Beneficiary: _____

Additional Comments/Questions:
