

**Planning for the End of Life:  
Making Sure Everything is in Order**

**Helping your Family when you aren't able**

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Health Insurance: \_\_\_\_\_  
\_\_\_\_\_

Prescription Medication Insurance \_\_\_\_\_  
\_\_\_\_\_

<u>Long Term Insurance policies</u>	<u>Policy Number</u>	<u>Contact information</u>

Home Owners Insurance: \_\_\_\_\_  
\_\_\_\_\_

<u>Family/Persons to be contacted</u>	<u>Address/Phone</u>	<u>Relationship</u>

Sources of pensions

Address/Phone Number

Other Information

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Name of Bank(s)

Account Number(s)

Contact Name/Number

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Safety Deposit Box: Yes: \_\_\_\_\_ No: \_\_\_\_\_

Name on Account: \_\_\_\_\_

Bank: \_\_\_\_\_

Key: Location: \_\_\_\_\_

Advisors:

Lawyer:

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Accountant:

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Banker:

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Trust Officer:

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Financial Advisor:

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Investment Advisor:

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Insurance Agent:

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Beautician/Barber:

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Pharmacy:

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Other Key People:

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Key Documents

Location \_\_\_\_\_.

Bank Statements \_\_\_\_\_

Will: \_\_\_\_\_

Durable/Financial Power of Attorney \_\_\_\_\_

Healthcare Power of Attorney \_\_\_\_\_

Original Stocks and Bonds: \_\_\_\_\_

Savings Bonds: \_\_\_\_\_

Life Insurance Policies: \_\_\_\_\_

Property Deeds \_\_\_\_\_

Mortgage Notes: \_\_\_\_\_

Original Trust Agreements: \_\_\_\_\_

Birth Certificates: \_\_\_\_\_

Marriage Certificates: \_\_\_\_\_

Auto/Boat Titles: \_\_\_\_\_

Military Papers: \_\_\_\_\_

Tax returns: \_\_\_\_\_

Address Book: \_\_\_\_\_

Other Important Papers: \_\_\_\_\_

\_\_\_\_\_  
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\_\_\_\_\_  
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Memberships to Cancel: (Club Memberships, book clubs, health clubs, recreation, etc)

Name

Contact: address/phone

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Other information

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Online Accounts, Usernames and Passwords

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Funeral Arrangements

Prepaid Funeral Expenses: yes: \_\_\_\_\_ no: \_\_\_\_\_

Funeral Home: Name            Address                            Phone Number/Contact Person

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Casket picked out    yes: \_\_\_\_\_            no: \_\_\_\_\_

If yes, Model/Style name: \_\_\_\_\_

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Cremation:    yes: \_\_\_\_\_            no: \_\_\_\_\_

If yes: Crematorium    Name            Address                            Contact name/phone number

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Service preferences:

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