



**My Way**

Babies are born when they are ready. Due dates and calendars have little to do with it. At the other end of our journey often the same is true. Age and health may have little to do with the time of one's passing.

Hopefully you have a Will and have named an executor. You may also have a trust and life insurance, but where do you keep these documents? When one passes there are many details that loved ones **must know immediately**. Organization is essential. Please take this opportunity to complete this guide for your family and friends so when the time comes it will done **Your Way**.

**IMMEDIATE FACTS:**

Your full name \_\_\_\_\_  
List aliases, maiden name, etc: \_\_\_\_\_  
Your Date of birth: \_\_\_\_\_ location: \_\_\_\_\_  
Social security number: \_\_\_\_\_  
The is the first question asked when someone passes is **“What Funeral home will be used?”**  
Funeral Home \_\_\_\_\_ Location \_\_\_\_\_  
Spouse’s name: \_\_\_\_\_ If deceased, date \_\_\_/\_\_\_/\_\_\_  
Who is the executor(s) of your estate? \_\_\_\_\_  
Phone # \_\_\_\_\_ email: \_\_\_\_\_  
Where are the keys to your house and car(s)? \_\_\_\_\_  
Where is your Safety Deposit box and keys? \_\_\_\_\_  
Bank account(s) Locations: \_\_\_\_\_ numbers: \_\_\_\_\_  
\_\_\_\_\_ individual \_\_\_\_\_ joint with \_\_\_\_\_

**FUNERAL:**

The is the very first question asked when someone passes is,  
**“What Funeral home will be used?”**  
Second question is, “Who is paying the funeral expenses?” or what account can be used for  
burial, cremation, death certificates (get MANY everyone needs proof of the passing)  
Preferred cemetery: \_\_\_\_\_  
Do you own Cemetery plot(s) mausoleum? \_\_\_\_\_  
Where is the certificate? \_\_\_\_\_ Is it prepaid? What is included?  
Do you prefer to be \_\_\_buried, \_\_\_cremated or \_\_\_placed in a mausoleum  
Where is a photo of yourself to display or use for reference: \_\_\_\_\_

CREMATED: Ashes - \_\_\_keep, \_\_\_bury or \_\_\_scatter? If so, where? \_\_\_\_\_

BURIED: Do you prefer an \_\_\_ open or \_\_\_ closed casket?

Clothing: \_\_\_ Formal \_\_\_ Uniform \_\_\_ casual Glasses \_\_\_ on or \_\_\_ off hairstyle

Jewelry (NEVER bury a loved one with any valuables) \_\_\_\_\_

Do you wish to be buried with \_\_\_religious paraphernalia \_\_\_ photographs \_\_\_other objects?

Pall Bearer suggestions: \_\_\_\_\_

Preferred flowers: \_\_\_\_\_

Charities for donations: \_\_\_\_\_

People to notify: Where do you keep addresses, phone numbers or email addresses of friends/family? \_\_\_\_\_

Music: \_\_\_\_\_

Speaker(s) religious or other: \_\_\_\_\_

**DOCUMENTS: Where do you keep the following?**

Birth certificate \_\_\_\_\_

Your Will and Trust \_\_\_\_\_

Life Insurance Policy: company and agent \_\_\_\_\_

Home owner's insurance policy: company and agent \_\_\_\_\_

Health Insurance Policy: company and number \_\_\_\_\_

Pension and social security information:

Beneficiaries, names, phone number(s), email addresses

Names of any previous spouses: \_\_\_\_\_

Date(s) of divorce \_\_\_\_\_ or their death \_\_\_\_\_

Where are your Divorce decree(s)

Tax documents, receipts for deductions

Investment documentation IRAs, ROTHs, etc.

Real Estate Titles/Quit Claim deeds: \_\_\_\_\_

Mortgages: Lender \_\_\_\_\_ Auto pay? \_\_\_ Bank \_\_\_\_\_

Car title(s) \_\_\_\_\_

Lender: \_\_\_\_\_ Auto pay? \_\_\_ Bank: \_\_\_\_\_

Credit card(s): \_\_\_\_\_

List of Bills: Which are auto pay? From what account?

**TECHNOLOGY: Where do you keep your...**

House and car keys (please label) \_\_\_\_\_

Cell phones, number(s) \_\_\_\_\_

Computer password(s) \_\_\_\_\_

**BELONGINGS:**

List of valuables such as:

Jewelry, art, furniture, collectables, antiques tools, equipment, family heirlooms etc.

Explain how to distribute to Family and Friends.

\_\_\_ List of who gets what:

\_\_\_ Take turns choosing?

\_\_\_ Estate sale

\_\_\_ Donate to what charities?

Please keep this up-to-date and tell someone where it is.