

To have lived, loved, laughed and learned — that is my legacy.



THINKING AHEADSM **FORE
THOUGHT[®]**

To those I leave behind

Because you care enough to plan ahead for those you'll leave behind

Using this booklet to record your funeral wishes and to organize life's many details assures that, when the time comes, those closest to you will have the necessary information to handle your affairs and celebrate your life.

Your preparation now means greater peace of mind for loved ones later. As you complete this record, know that you are giving your family a most thoughtful gift. This simple, caring gesture will help ensure a meaningful funeral experience and comfort them in their time of loss. And they won't have to worry if they made the right choices.

Please make your loved ones aware that this document exists and keep it in a safe place, where they may easily access it. You may also want to provide a photocopy to a loved one who lives outside your home.

Personal record

It's out of pure and simple love that I leave you with this gift to guide and protect you at this most difficult time.

My wish is to spare you any unnecessary expense and the burden of having to make decisions under pressures of time and emotion. That's why I have expressed my wishes and provided the information you'll need to answer the many questions you'll be asked. I have also shared my personal thoughts and memories.

May you find as much comfort and meaning within these pages as I found in preparing them.

Signed _____

Date _____

Full name

First _____ Middle _____

Last _____

Street address _____

City _____ State / Province _____ ZIP _____

Years at address _____

State residence since _____

Previous address _____

Years at previous address _____

Place of birth _____

Date of birth _____

Social Security number _____

Country of citizenship _____

Personal record

Marital status

Single Married Divorced Widowed

Maiden name _____ Spouse's name _____

Date and place of marriage _____

Education

School(s) _____

Degree(s) _____

Occupation _____

Employer _____

Military service

Branch _____ Rank _____ Serial number _____

Date and place of induction _____ Date and place of discharge _____

Father's name _____

Birthplace _____

Mother's maiden name _____

Birthplace _____

Family record

Spouse /
loved one _____

Parents _____

Children _____

Siblings _____

Family record

Grandchildren

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Great
Grandchildren

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Additional family
members

_____	_____
_____	_____
_____	_____
_____	_____

My life and memories

*Life is a succession of moments. To **live** each one is to succeed.*

– Corita Kent

Milestones

First job _____

First car _____

High school graduation _____

College graduation _____

Wedding _____

First home _____

Becoming a parent _____

Becoming a grandparent _____

Other milestones _____

My life and memories

To **love** and be loved is to feel the sun from both sides.

– David Viscott

Favorites

Color _____

Flower _____

Season _____

Song _____

Poem _____

Scripture _____

Book _____

Saying _____

Other favorites _____

My life and memories

Laughter is wine for the soul ... the hilarious declaration
made by man that life is worth living.
– Sean O’Casey

Recollections

Close friends _____

Mentors / role models _____

Pets _____

Family traditions _____

Great inspirations _____

Fond memories _____

Special achievements _____

My life and memories

*In youth we **learn**; in age we understand.*
– Marie Ebner Von Eschenbach

Cherished mementos _____

Family heirlooms _____

Hobbies / interests _____

Special talents _____

Community service _____

Clubs / organizations _____

Military experience _____

Important documents

Please specify the location of each item.

Birth certificate	_____		
Children's birth certificate(s)	_____		
Marriage license	_____		
Veterans discharge papers / military records	_____		
Last will and testament	_____		
Funeral and cemetery arrangement documents	_____		
Life insurance policies	_____		
Health and accident policies	_____		
Property insurance policies	_____		
Real estate deeds	_____		
Mortgages / notes	_____		
Bank records	_____		
Stocks / bonds / CDs	_____		
Pension / retirement plans	_____		
Income tax records	_____		
Auto registration / title	_____		
Safe deposit box	_____	_____	_____
	Location	Box number	Key(s)
Other documents	_____		

Important information

Insurance

Life

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy number	Benefit amount	Beneficiary
---------------	----------------	-------------

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy number	Benefit amount	Beneficiary
---------------	----------------	-------------

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy number	Benefit amount	Beneficiary
---------------	----------------	-------------

Health and accident

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy number and details

Insurance Company	Agent	Phone
-------------------	-------	-------

Policy number and details

Property (homeowners, auto, other)

Insurance Company	Agent	Phone
-------------------	-------	-------

Property insured	Type of insurance	Policy number
------------------	-------------------	---------------

Important information

Insurance

Property (homeowners, auto, other)

Insurance Company	Agent	Phone
Property insured	Type of insurance	Policy number
Insurance Company	Agent	Phone
Property insured	Type of insurance	Policy number

Banking, investments and credit accounts

Banking

Institution	Phone
Account type	Account number
Institution	Phone
Account type	Account number
Institution	Phone
Account type	Account number
Institution	Phone
Account type	Account number

Important information

Investments

Investment type	Company	Acct. / Cert. number
Investment type	Company	Acct. / Cert. number
Investment type	Company	Acct. / Cert. number
Investment type	Company	Acct. / Cert. number
Investment type	Company	Acct. / Cert. number

Credit accounts

Creditor	Address	Phone	Acct. number
Creditor	Address	Phone	Acct. number
Creditor	Address	Phone	Acct. number
Creditor	Address	Phone	Acct. number
Creditor	Address	Phone	Acct. number

Personal Advisors

Accountant	Address	Phone
Attorney	Address	Phone
Clergy	Address	Phone
Investment Advisor	Address	Phone
Physician	Address	Phone

Final wishes

First person to be notified upon my death

Name _____

Relationship _____

Address _____

Phone _____

Email _____

Funeral Home to contact

Name _____

Address _____

Phone _____

Counselor / Advisor _____

Your funeral professional can help plan a meaningful, personalized celebration of your life.

Funeral preferences

Place of service

Church Name _____

Funeral Home Name _____

Cemetery Name _____

Other Name _____

Person to officiate _____

Final wishes

Special instructions _____

Music selections _____

Readings _____

Flowers _____

Personal touches /
items to display _____

Special services / Ceremonies
(fraternal, military, spiritual, etc.) _____

Personal instructions

Clothing _____

Glasses _____

Jewelry _____

Other _____

Final wishes

Suggested memorial contributions

Pallbearers

Honorary pallbearers

Other requests

Final wishes

Final disposition

- Earth burial
- Mausoleum entombment
- Cremation / Inurnment
- Other (please specify) _____

Name of Cemetery / Mausoleum _____

Address _____ Phone _____

Description of burial property _____

Casket selection _____

Urn selection _____

Vault selection _____

Personalization choices _____

Permanent memorial
Type _____

Inscription _____

Special people

Please be sure to notify these people of my passing:

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Special people

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

Name _____
Relationship _____
Address _____

Phone _____
Email _____

In loving memory

... My stories are my wealth.

– Angela Sidney

How I wish to be remembered

THINKING AHEADSM FORE
THOUGHT[®]