



Love Letter to My Family



Unity of Charlottesville
2825 Hydraulic Circle
Charlottesville, VA 22901
(434) 978-1062
unityofcharlottesville@gmail.com
www.unitycharlottesville.org

The Reason Why

As a valued member of Unity of Charlottesville, it is our deepest intention to be of service to you and your family, especially during times of transition.

One of the most difficult and challenging situations we face in life is the death of a loved one. That's why we've created this booklet. By engaging in courageous conversations with yourself and your loved ones, our hope is that your Unity spiritual community can help you navigate the death of a love one with ease and grace, and help you to create a plan that you can leave for the benefit of your loved ones.

We have prepared this booklet so that you can answer some important questions and leave vital information for your surviving loved ones. There are two parts to this booklet.

Part 1 is about your wishes concerning your Celebration of Life (funeral or memorial) service and your wishes about burial or cremation. We invite you to make a copy of this and leave it with the Unity office in a confidential file so that we can best support and serve your family when the need arises.

Part 2 is about the practical details that your family need to know about if or when you become ill or die. These are worksheets that you and your family can turn to after the death of a loved one.

The truth is, most people never think about the many questions a surviving spouse or children have to face when a person dies. Many decisions have to be made within a day or two after your death or the death of a loved one.

Do you or your loved one want to be buried or cremated? If so, where? Do you want there to be a Celebration Life Service? If so, what kind, who will officiate, what readings or songs will be offered, who will speak, do you want there to be flowers, will there be a reception after?

These are just a few of the questions that must be made during a time of great emotional stress and

grief. We want to honor our loved one in the best way possible, or we may have wishes about our own service when we die.

At the same time, life must go on and the survivors need to know about important things such as the location of assets or a will, and even the smaller details of where the car keys are.

If you die today, how much searching will your family have to do? Could they easily find all life insurance policies? What about insurance on your home, your car, or your business assets? How about the health insurance policy—it might be needed to cover last illness expenses? Could they easily find your birth certificate, military discharge, and social security number? How about all property titles?

Those things—and many others—will be important in the process of settling your estate and getting the assets you leave to the right people.

Do it right - now

These are sobering thoughts and they may be sad or painful to consider. But by engaging in a courageous and compassionate conversation with yourself—and your loved ones right now, the reward to you will be peace of mind. and the knowledge that your wishes will be carried out and that your loved ones will be provided for.

Love Letter to My Family

I (Your Name) _____ have filled out the pages of this booklet in an effort to help you, my family, after my death. I want to ease your burdens in those challenging days by giving you ideas of how I feel about some things. As much as possible, I don't want you to wonder "how would I have wanted things done?"

This is not a legal document. My will or estate plan document is the legal plan for my estate. But a will may not be very well adapted to communicating my personal wishes to you.

1. My thoughts expressed in this booklet should not be considered rigid or binding. Situations may change. And those changes may call for a different plan of action than I may have outlined here.

It is also my hope that my listing of assets and the list of where things can be found will save you a lot of time and worry.

2. Note: You may want to add a personal letter to your family of thoughts not expressed here.

PART 1

Making Your Own Celebration of Life Plans

(We invite you to make a copy of this to leave with the Unity Office in a confidential file)

It may sound unusual to a lot of people to suggest that you make your own Celebration of Life plans. But it really makes a lot of sense. After all, who knows better what you want than you?

Most people have specific likes and dislikes regarding funerals. Some like everything to be simple. Others favor something more elaborate. Whatever you prefer, the best way to have it your way is to write your wishes down.

To help you, let's consider some of the things you may want to decide so your family doesn't have to.

Funeral Home

You probably have a preference about which funeral home will handle your arrangements. If you choose cremation, you may want to talk to the funeral director about his services, legal requirements, and costs.

Some people choose to sit down with the funeral director to make many of the arrangements. He or she can keep your plans on file, or you may leave your arrangements in a confidential file at Unity.

Memorial or Celebration of Life Service

Most people choose to have a funeral memorial service in a church or at the funeral home. Your written plan should include your preference.

Also, specify if you want a public or private memorial service. Do you want the casket open or closed at the funeral home—at the memorial service? Do you want graveside services—and, if so, do you want them to be public or for the family only? Do you want a military service (if you qualify)? Do you want someone to give a eulogy? If so, who?

Other Arrangements

Many people purchase a cemetery plot prior to death. It's a difficult task for family members to have to go to the cemetery the day after a loved one has died to make decisions.

If you won a cemetery plot—or buy one—be sure to put the legal description in your funeral plan. Also, list the location of the deed on your "Where Things Are" list.

Headstones are another expensive item where family members often go overboard without the input of what their loved one may have wanted.

Like cemetery plots, more people are now buying headstones while both spouses are still alive. That way, they can decide what is going to be put on the stone.

Even casket and burial vault selections can be specified. There's a wide range in choices and prices. It might even be a good idea to visit with the funeral director now and look at the choices. That way, you can give your family specific guidelines of your wishes

Personal Requests

Many people have definite ideas about the kind of service they would prefer, the people involved, and the matter of flowers or memorials.

Let's look at some of the things you might consider:

- Music choices. Do you want a soloist? If so, is there someone whose music is especially meaningful to you or your family? Maybe you name that person. But it's a good idea to list a second choice in case the first isn't available. You might do the same for the pianist. You may want to specify what songs or hymns you would like.
- Name the pastor you would like to have lead the memorial service. You may name him or her by name or simply specify that it be the one serving your church at the time of your death. If you want someone to give a eulogy, specify who you prefer.
- Casket bearers chosen ahead of time can ease another chore for your family. You may want to list more than six in order of preference. Then if someone can't serve, there's a reserve to choose from.
- You may have favorite scriptures or readings that you would like to have used at your memorial service. If so, list them.
- Flowers. Many people prefer a limited number of flowers and prefer that, instead, money can be given to the church or other worthwhile charity.
- Personal items. Let your family know (in writing) what you prefer with regard to rings, jewelry, and clothing. If you don't have a specific preference, say so.

- You may want to make a list of names, addresses, emails, and phone numbers of friends and relatives who you would like to be notified of you or your loved one's passing for either a general announcement, or an invitation to attend the Celebration of Life service.

Obituary

In times of grief, it may be difficult to write an obituary for yourself or a loved one. Planning in advance, or even writing your own obituary allows you to mention things that are important to you about your life or the life of your loved one.

What are you proud about your life? What are your passions? How did you contribute to the people around you? What occupations? What education? What organizations did you belong to or serve? What family members do you want to list as survivors? What would you like people to know about you or remember about you?

My Personal Celebration of Life Wishes

(You may choose to copy this portion to leave in a confidential file at the Unity Office)

In the Event of My Death

Funeral Parlor: _____ Prepaid Cemetery Plot: _____

Name: _____ Cemetery: _____

Contact Person: _____ Cemetery: _____

Address: _____ Address: _____

Phone: _____ Plot/Drawer No.: _____

Email: _____ Information can be found: _____

The minister(s) or officiants I wish to perform my Celebration of Life service:

I have a deceased Spouse, _____ Parent, _____ Child _____ who is buried at:

and I wish DO _____ DO NOT _____ wish to be buried next to such person.

I DO _____ DO NOT _____ want to be cremated.

Name of Crematory: _____

Pallbearers:

Music Request:

Soloist: _____

Pianist: _____

Songs/Hymns: _____

Favorite Scriptures/Readings: _____

Obituary (Things you want included and newspapers where you want it published: _____

Tombstone Engraving: _____

Flower/Memorial Ideas: _____

In lieu of flowers please ask for donations to: _____

Other special requests: _____

Family History

I was born in _____ on _____, 20____

My parents were _____ and _____

My maternal grandparents were _____ and _____

My paternal grandparents were _____ and _____

My children are _____ Born _____

_____ Born _____

_____ Born _____

_____ Born _____

I have no children.

I have detailed information on my family's history. It is located at: _____

In the Event of My Partner's Death

Funeral Parlor: _____ Prepaid Cemetery Plot: _____

Name: _____ Cemetery: _____

Contact Person: _____ Cemetery: _____

Address: _____ Address: _____

Phone: _____ Plot/Drawer No.: _____

Email: _____ Information can be found: _____

The minister(s) or officiants I wish to perform my Celebration of Life service:

I have a deceased Spouse, _____ Parent, _____ Child _____ who is buried at:

and I wish DO _____ DO NOT _____ wish to be buried next to such person.

I DO _____ DO NOT _____ want to be cremated.

Name of Crematory: _____

Pallbearers:

Music Request:

Soloist: _____

Pianist: _____

Songs/Hymns: _____

Favorite Scriptures/Readings: _____

Obituary (Things you want included and newspapers where you want it published: _____

Tombstone Engraving: _____

Flower/Memorial Ideas: _____

In lieu of flowers please ask for donations to: _____

Other special requests: _____

My Partner's Family History

I was born in _____ on _____, 20__

My parents were _____ and _____

My maternal grandparents were _____ and _____

My paternal grandparents were _____ and _____

My children are _____ Born _____

_____ Born _____

_____ Born _____

_____ Born _____

I have no children.

I have detailed information on my family's history. It is located at: _____

PART 2

Some personal thoughts and guidelines

Advisors

Some of the people you may need to contact are listed below:

Attorney:

Name: _____
Address: _____
Phone: _____
Email: _____

Insurance Agent:

Name: _____
Address: _____
Phone: _____
Email: _____

Accountant:

Name: _____
Address: _____
Phone: _____
Email: _____

Mortgage Holder:

Name: _____
Address: _____
Phone: _____
Email: _____

Financial Planner:

Name: _____
Address: _____
Phone: _____

Other:

Name: _____
Address: _____
Phone: _____

Email: _____ Email: _____

This is a brief explanation of my feelings about keeping or disposing of property I own: _____

My thoughts concerning remarriage by my spouse are: _____

My views relating to heroic medical care are:

If there is no reasonable expectation of my recovery from physical or mental illness, I request that action should not be taken to keep me alive continuously by artificial or heroic means. However, to avoid burdening my family members in making this decision, it is my desire, in the event of a grave illness and under appropriate circumstances, that the physician or physicians in attendance be apprised of the request contained in the first sentence of this paragraph, and that the recommendations of the physician or physicians be followed.

Signatures (both spouses)

Witnessed by: _____

_____ Date : _____

Note: this is just a sample letter (and is not intended as a legal form). You should ask your attorney about the laws regarding a "living will" in your state.

My views relating to donation of my body or organs are:

I DO _____ DO NOT _____ want my body donated to a medical or research facility. I have a preference of where my body is to be donated, I will list it on this page. If not, my family can make that choice.

I DO _____ DO NOT _____ want any of my organs donated. If I have any preferences regarding these donations, I will list them on this page.

Signatures (both spouses)

Witnessed by: _____

_____ Date : _____

Note: Again, this is not intended as a legal form. It will be better if you make these arrangements now. If you want to donate your body for medical research, ask your doctor or attorney how to make those arrangements. If you want to donate organs, fill out a donor card and carry it with you. Again, ask your doctor or attorney.

Checklist for my family

Several things have to be done in the time immediately following the death of a loved one. The following provides a checklist and some ideas about how to handle these things.

Contact the Social Security Administration. Social Security pays a lump sum death benefit. The surviving spouse can get benefits as early as age 60—earlier if disabled. Children under age 18 when a parent dies may also be entitled to benefits.

Veteran benefits may be available if the deceased served in the Armed Forces. The surviving spouse and dependent children may be entitled to a small pension. The Veterans Administration will pay some towards burial expenses and provide a headstone or marker and an American flag to drape the casket without charge. If burial is in a national cemetery, the VA will provide a graveside and pay burial costs.

Organizations that the deceased belong to two should be notified of the death. Some offer

memorial services. They may have life insurance and may return part of dues paid. You may want to list organizations you belong to in this booklet.

Former employers should be contacted to see if there are any benefits resulting from that employment. You may want to make a list of former employers in the back of this booklet.

Collect any life insurance policies and contact the company. The beneficiary can choose to take proceeds in a lump sum or spread them out as payments over the years. If you have a preference of how your beneficiaries receive the proceeds, spell it out in this booklet.

Keogh and IRA plans may have money left in them to be paid out to survivors. The survivors should contact the company holding that money. Like life insurance, proceeds can be paid out in a lump sum or in installments. Tax advisers should usually be consulted before the beneficiaries make that decision.

Check with the health insurance company. They may pay some expenses from the last illness. Rates may also be less if the policy has covered two or more people and now there will be one less person covered. Some health insurance policies are also combination policies that provide some death benefits.

Property titles will be changed in the estate settlement process. Along with those changes, the new owner should have the names changed on insurance policies on those properties.

Titles on all bank accounts should be changed. This includes both checking and savings accounts.

Contact the attorney to have the will read and see what must be done with regard to estate settlement.

Assistance May Be Available

Don't be afraid to ask for help during the time of grieving. You can request that the funeral director make the first contact with the Social Security administration and the Veterans Administration. He or she can also see that you have as many

copies of the death certificate as you will need. You will need these for the banks, insurance companies, and other financial institutions.

A note to organizations and former employers is usually adequate to get the wheels in motion if there any benefits available.

Your estate attorney may also be requested to contact the insurance companies and the Keogh and IRA accounts. However, since the attorney will charge a fee, a family member may prefer to do this job.

A family member can also check with the health insurance company. The doctor and or hospital may also file any claims forms or help the family member with them.

An attorney will usually be needed to settle the estate. That will also involve property title changes. A family member can contact insurance agents to change titles on the policies.

Beyond these things, check with the legal and financial advisors listed elsewhere in this booklet and follow your own good judgment and inner guidance.

Where Things Are

Will (original) _____
 Spouses will (original) _____
 Cemetery plot deed _____
 Burial instructions _____
 Copy of will _____
 Copy of spouse's will _____
 Insurance policies _____
 Life _____
 Health _____
 Accident _____
 Homeowners _____
 Business _____
 Automobile _____
 Birth certificates _____
 Marriage certificate _____
 Children's birth certificates _____
 Citizenship papers _____
 Adoption papers _____
 Divorce records _____
 Ante-nuptial agreement _____
 Military discharge _____
 Trust agreements _____
 Partnership agreements _____
 Incorporation papers _____
 Tax returns _____
 Federal income _____
 State income _____
 Federal gift _____
 State gift _____
 Federal estate _____
 State inheritance _____
 Money accounts _____
 Checking _____
 Savings _____
 Bank statements _____
 Canceled checks _____

Checkbooks _____
 Savings passbooks _____
 List of credit cards _____

 Stock certificates _____
 Mutual funds _____
 Bonds _____

 Other investments _____
 Keogh or IRA records _____
 Annuity contracts _____
 Stock-option plans _____
 Stock-purchase plans _____
 Profit-sharing plans _____
 Retirement plans _____
 Titles _____
 Autos _____
 Land _____

 Rental property records _____
 Notes and loans _____

 Safety deposit box _____
 List of memberships _____
 List of special bequests _____
 Safe combination _____
 Safe deposit box key _____

Important Numbers

Social Security Numbers – Spouses and children

Name	Number	Name	Number
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Credit Card numbers

Name of card	Number	Name of card	Number
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Bond Serial Numbers

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Checking Account numbers _____

Savings Account numbers _____

Safe deposit box number _____

Safe Combination _____

Insurance policy numbers

Health _____

Automobile _____

Homeowners _____

Other property _____

Other _____

Life insurance

Insured's Name	Amount of Coverage	Policy Number	Agent or Company

Stock, Securities, or Mutual Funds

Owner	Present Value	Type of Asset	Certificate Number	Company or Agent to contact

List of Assets

It's an excellent idea to make a summary of the assets you own right now. The following form will guide you. You may want to write it in pencil so you can update it on an annual basis.

This information will be valuable to you in estate planning now, and to your heirs at estate settlement time.

Description: On most assets, a very brief description of the asset such as "200 acres" or "cattle" will be adequate.

Owner: If the husband is the sole property owner, put "H" after that in the first column. If the wife is the owner, put "W". If the property is owned and joint tenancy put "JT". If its tenancy is common, put "TC".

Fair market value: Assets are to be valued at fair market value (what they should sell for) in your estate. Estimate is close as possible and be realistic.

Amount owed: Debts and mortgages may be deductible in your estate so make sure that you list all of these on this form.

Original cost: The original cost of items can be a big factor in how much tax will be owed when assets are sold or passed on. This can also be a difficult figure for someone else to find. Therefore, list the original cost basis on all assets that you can, especially property and investments.

Finally, when you update this estate summary, it's a good idea to write somewhere on this sheet the date it was updated.

Property	Description/owner	Fair Market Value	Amount Owed	Original Cost
Land	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Real Estate	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Machinery	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Livestock	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Grain	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____

Stocks	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Bonds	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Checking	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Savings	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Keogh/IRA	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Amounts owed to you	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Automobiles	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
Household Effects	_____ / _____	_____	_____	_____
Personal Effects	_____ / _____	_____	_____	_____
Other	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____
	_____ / _____	_____	_____	_____

I work at:

Company Name: _____
Contact Name: _____
Phone Number: _____

I have the following benefits where I work or worked (briefly describe):

Deferred Compensation: _____
Stock Ownership: _____
Stock Options: _____
Cafeteria Plan: _____
Other: _____

I am an owner of the following business:

Business Name: _____
Ownership Percentage: _____
Other owner(s) Name: _____ Contact No.: _____
Name: _____ Contact No.: _____

I have the following benefits through my business (briefly describe):

Deferred Compensation: _____
Buy/Sell Agreement: _____
Stock Ownership: _____
Stock Options: _____
Cafeteria Plan: _____
Other: _____

I am retired, and have the following pension income:

Company	Contact Phone No.	Monthly Income	Survivor Benefit
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Income:

I receive Monthly Income from the following annuity or annuities:

Company: _____ Company: _____
Policy No.: _____ Policy No.: _____
Monthly Income: _____ Monthly Income: _____
Phone: _____ Phone: _____

Company: _____ Company: _____
Policy No.: _____ Policy No.: _____
Monthly Income: _____ Monthly Income: _____
Phone: _____ Phone: _____

I am entitled to veterans benefits due to the following military service:

Description of military service: _____
Years of service—From: _____ To: _____
Contact the Veterans Administration at: _____

ASSETS

Here is a list of all my investment accounts. I have listed a contact person and telephone number for each item, as well as the location of any documents.

Custodian: _____ **Custodian:** _____
Account No.: _____ Account No.: _____
Title of Account: _____ Title of Account: _____
Custodian Phone: _____ Custodian Phone: _____
Statements are located: _____ Statements are located: _____

Custodian: _____ **Custodian:** _____
Account No.: _____ Account No.: _____
Title of Account: _____ Title of Account: _____
Custodian Phone: _____ Custodian Phone: _____
Statements are located: _____ Statements are located: _____

Custodian: _____ **Custodian:** _____
Account No.: _____ Account No.: _____
Title of Account: _____ Title of Account: _____
Custodian Phone: _____ Custodian Phone: _____
Statements are located: _____ Statements are located: _____

Custodian: _____ **Custodian:** _____
Account No.: _____ Account No.: _____
Title of Account: _____ Title of Account: _____
Custodian Phone: _____ Custodian Phone: _____
Statements are located: _____ Statements are located: _____

Custodian: _____ **Custodian:** _____
Account No.: _____ Account No.: _____
Title of Account: _____ Title of Account: _____
Custodian Phone: _____ Custodian Phone: _____
Statements are located: _____ Statements are located: _____

Here is a list of other investments I own:

Investment: _____	Investment: _____
Contact: _____	Contact: _____
Phone: _____	Phone: _____
Documents are located: _____	Documents are located: _____
_____	_____

Investment: _____	Investment: _____
Contact: _____	Contact: _____
Phone: _____	Phone: _____
Documents are located: _____	Documents are located: _____
_____	_____

Investment: _____	Investment: _____
Contact: _____	Contact: _____
Phone: _____	Phone: _____
Documents are located: _____	Documents are located: _____
_____	_____

Money Owed to or From:

Money is owed to us by: _____	Money is owed to us by: _____
Name: _____	Name: _____
Address: _____	Address: _____
Phone: _____	Phone: _____
Amount: _____	Amount: _____

LIABILITIES

Here is a list of our liabilities, including a contact name and phone number of each, as well as the location of any related documents.

Liability: _____ **Liability:** _____
Contact: _____ Contact: _____
Phone: _____ Phone: _____
Documents are located: _____ Documents are located: _____

Liability: _____ **Liability:** _____
Contact: _____ Contact: _____
Phone: _____ Phone: _____
Documents are located: _____ Documents are located: _____

Liability: _____ **Liability:** _____
Contact: _____ Contact: _____
Phone: _____ Phone: _____
Documents are located: _____ Documents are located: _____

I presently carry the following credit cards:

Company: _____ Company: _____
Card No.: _____ Card No.: _____

Company: _____ Company: _____
Card No.: _____ Card No.: _____

Company: _____ Company: _____
Card No.: _____ Card No.: _____

Company: _____ Company: _____
 Card No.: _____ Card No.: _____

Company: _____ Company: _____
 Card No.: _____ Card No.: _____

Company: _____ Company: _____
 Card No.: _____ Card No.: _____

Insurance Coverage

I have the following life insurance policies. Please check with each company and determine if:

The policy allows for pre-payment of death benefits in the case of disability

The policy allows you to stop making premium payments in the case of disability

Type	Owner	Beneficiary	Face Amount	Company	Phone	Location of Policy
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

I have the following other Insurance policies.

Type of Insurance	Company	Policy No.	Location of Policy
Disability	_____	_____	_____
Long Term Care	_____	_____	_____
Health Insurance	_____	_____	_____
Umbrella	_____	_____	_____
Homeowners	_____	_____	_____
Auto	_____	_____	_____
Other	_____	_____	_____

Documents

I have executed each of the following documents and you can find them where noted:

Document	Location	Date Signed
Will or Trust:	_____	_____
Medical Directive:	_____	_____
Medical Power of Attorney:	_____	_____
General Power of Attorney:	_____	_____
Living Trust:	_____	_____
Insurance Trust:	_____	_____
Charitable Trust:	_____	_____
Minor's Trust:	_____	_____
Pre-Nuptial Agreement:	_____	_____
Post-Nuptial Agreement:	_____	_____
Citizenship Papers:	_____	_____
Retirement Plan Beneficiary Designation:	_____	_____

I have appointed (**in the above documents**) the following persons to act on my behalf if I become disabled:

Power of Attorney over my Assets:	1st _____	2nd _____
Power of Attorney for Medical Decisions:	1st _____	2nd _____
Guardian over my Property:	1st _____	2nd _____
Guardian over my Person:	1st _____	2nd _____

It is my desire that the persons having the above powers of attorney act on my behalf rather than a guardian being appointed, unless my family believes guardianship is necessary.

I HAVE _____ HAVE NOT _____ attached a list of the persons I want to receive my personal property when I die.

My Medical Directive states that in the event of my incapacity, I DO _____ DO NOT _____ want to be kept home as long as possible, taking into account the cost.

I DO _____ DO NOT _____ have a divorce decree which may require that certain payments be made if I am disabled or after my death. This document is located: _____

General Information

My Safe Deposit Box can be found at: _____

and the key can be found at: _____

The following people have signature authority on the box: _____

My Personal Safe can be found at: _____

The combination is: _____

The Password to my computer is: _____

My Email Address is: _____ User ID _____ Email Password is: _____

Other Passwords

Account	User Name	Password
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

I may receive an inheritance from: _____

Upon my death, my heirs WILL _____ WILL NOT _____ receive a distribution or benefits from a trust.

If yes, the trust instrument was created by: _____

The trust can be found: _____

I am currently the Trustee for a trust. The trust document is located at:

I am a beneficiary of a trust. If I am a beneficiary, the trust document is located at:

I am entitled to military and/or government benefits. The benefits are:

I am entitled to other benefits. The benefits are: _____

I am a member of the following religious group: _____

I am a member of the following fraternal groups: _____

I have provided the following for the education of my family:

DESIRES FOR MY FAMILY

When I am gone, I hope my family will learn from my experiences:

I believe that the most important things in life are:

The most important thing I have done in my life is:

It is my hope that my family will use its inheritance from me to accomplish the following goals in their lives:

How I would like to be remembered:

