END-OF-LIFE PLANNER

Everything my family will need to know

This planner belongs to _____

Date completed _____

Last reviewed _____

Keep this with your will. Tell two people where it is.

How to use this planner

This planner puts in one place the things your family will be asked in the first weeks after your death. Most of it takes minutes to write down now and days to find out later.

Filling it in

Use a pencil. Fill in what you know and skip what does not apply. Come back to the harder pages. A planner that is half complete is far more use than none.

Start with three pages: People to tell, Where my documents are, and My service wishes. Those answer the questions that come first.

Keeping it safe

Do not write full account numbers, card numbers or passwords in this planner. Write where each account is held and where your passwords are kept. That is enough for the person handling your affairs, and it keeps the planner safe to leave in a drawer.

Keep the planner with your will. Give a copy to the person who will act for you, or tell them exactly where it is. Tell one other person as well.

Keeping it current

Read it through once a year and after any large change: a move, a marriage, a death, a new account. Write the date on the cover each time.

What this planner is not

It is not a will, and nothing written here is legally binding. It tells your family what you want and where things are. To decide who receives your property, or who makes decisions if you cannot, see a lawyer about a will, a power of attorney and a health care directive.

About me

Full legal name _____

Other names I have used _____

Date of birth _____

Place of birth _____

Father's full name _____

Mother's full name, with maiden name _____

Citizenship _____

Marriage

Marital status _____

Spouse or partner's full name _____

Date and place of marriage _____

Former spouses, with dates _____

Military service

Branch and dates of service _____

Rank and service number _____

Where my discharge papers (DD Form 214) are _____

Faith and community

Place of worship _____

Clergy or leader to contact _____

Clubs, lodges and groups to notify _____

People to tell

The person I have asked to handle my affairs _____

Their phone number _____

A second person, if the first cannot _____

Their phone number _____

Family and friends to call

Name	Relationship	Phone

People who can help

These are the people who hold my records or can answer questions.

Role	Name and firm	Phone
Lawyer		
Accountant or tax preparer		
Financial adviser		
Insurance agent		
Doctor		
Employer or former employer		
Clergy		
Funeral home		
Landlord or property manager		
Veterinarian		
Other		

Notes

My obituary

Write your obituary on the next page, or answer these questions and let your family write it.

Schools I attended, with years _____

Work I did, with employers and years _____

What I was proudest of _____

_____

_____

What I loved doing _____

_____

_____

How I would like to be remembered _____

_____

_____

The photograph I would like used _____

Where that photograph is _____

Newspapers it should appear in _____

Charity for memorial gifts _____

My obituary, in my own words

Leave the date and the list of survivors for your family to complete.

My service wishes

I would like

- [ ] A funeral, with my body present
- [ ] A memorial service afterward
- [ ] A celebration of life
- [ ] A graveside service only
- [ ] No service
- [ ] Whatever my family prefers

Where it should be held _____

Who should lead it _____

Religious or not _____

Details

Music I would like _____

Readings, prayers or poems _____

People I would like to speak _____

Pallbearers _____

Flowers, or donations to _____

What I would like to wear _____

What I would like people to wear _____

Anything else

_____

_____

_____

Burial or cremation

I would like

- [ ] Burial
- [ ] Cremation
- [ ] Natural or green burial
- [ ] Donation of my body to science
- [ ] To be an organ donor
- [ ] Whatever my family prefers

Funeral home I prefer _____

Have I prepaid? Where is the contract? _____

Cemetery _____

Do I own a plot? Where is the deed? _____

If cremated, what should be done with my ashes _____

_____

Words for my headstone or marker _____

_____

Military funeral honors: yes or no _____

Where my documents are

Write the place, not the contents: "blue folder, desk drawer" or "safe deposit box at First National."

Document	Where it is
Will	
Trust papers	
Power of attorney for finances	
Health care directive or living will	
Birth certificate	
Marriage certificate	
Divorce papers	
Military discharge (DD Form 214)	
Social Security card	
Passport	
Deeds to property	
Vehicle titles	
Recent tax returns	
Insurance policies	
Safe deposit box and key	
Safe and its combination	
Other	

Bank and investment accounts

Do not write full account numbers. The name of the bank and the kind of account are enough to find it.

Bank or company	Kind of account	Where the statements are

Notes

Insurance, pensions and benefits

Life insurance

Company	Where the policy is	Who it pays

Pensions and retirement accounts

Company or employer	Kind of account	Who it pays

Other benefits

Social Security _____

Veterans benefits _____

Annuities _____

Union or lodge benefits _____

What I owe and what I pay

Loans and debts

Owed to	For what	Where the papers are

Regular bills

Paid to	How it is paid	When
Mortgage or rent		
Electricity		
Gas or oil		
Water		
Phone and internet		
Insurance		
Property tax		

Home, vehicles and property

My home: owned or rented _____

Mortgage holder or landlord _____

Where spare keys are _____

Alarm company and how to turn it off _____

Storage unit, with location _____

Other property I own _____

Vehicles

Vehicle	Where the title is	Loan, if any

Things to know about the house

_____

_____

_____

_____

_____

My digital life

Do not write passwords here. Say where they are kept.

Where my passwords are kept _____

How to unlock my phone _____

How to unlock my computer _____

My main email address _____

Other email addresses _____

Online accounts

Account	What I would like done with it
Facebook	
Other social media	
Photo storage	
Online banking	
Shopping accounts	

Subscriptions to cancel

_____

_____

_____

_____

Pets and people who depend on me

Pets

Name and kind	Veterinarian	Who should take them

Food, medicine and routine _____

_____

_____

People I care for

Name _____

What they need _____

Who should take over _____

Name _____

What they need _____

Who should take over _____

Keepsakes

Your will decides who receives your property. Use this page for things of small value that matter to you, and tell your family it exists.

Item	Where it is	I would like it to go to

Letters to my family

Anything you would like them to read.

For my family: the first week

A list to work through. Not everything will apply.

First

- [ ] Call the person named on the "People to tell" page
- [ ] Call the funeral home
- [ ] Find this planner, my will and any prepaid funeral contract
- [ ] Look after anyone who depends on me, and my pets
- [ ] Lock the house and collect the mail

In the first days

- [ ] Ask the funeral home for its itemized price list
- [ ] Order certified copies of the death certificate. You will need one for most accounts, so ask for ten or more
- [ ] Finish and publish my obituary
- [ ] Tell my employer or pension provider
- [ ] Plan the service using the wishes on these pages

In the weeks after

- [ ] Confirm that Social Security has been told. The funeral home usually reports it
- [ ] See a lawyer about the will
- [ ] Tell banks, insurers and any lender
- [ ] Claim life insurance
- [ ] Cancel subscriptions and close online accounts
- [ ] Forward the mail

Notes

Dates I reviewed this planner

Date	What I changed