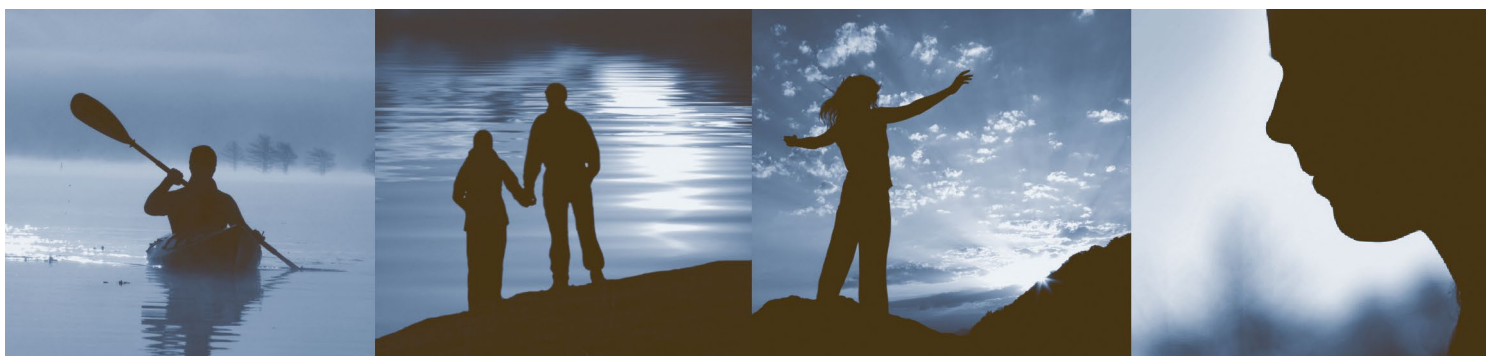


Thoughtful Decisions

Planning Guide



A KEEPSAKE PORTFOLIO

DEAR LOVED ONES

I prepared this guide for you and those I care about. Inside, you will find a brief overview of my life, a listing of those most dear to me, and some of my most precious memories. For your peace of mind, as well as my own, I have included wishes for my funeral service along with other vital information you will need at the time of my death.

I completed this guide with much love and foresight. My desire is to lessen the burdens you will have at my time of passing so that you can celebrate our life together.



VITAL STATISTICS

Full Legal Name

First:	Middle:	Last:
Legal Address:		
City:	State:	Zip:
Phone:	Email:	
Sex:	Race:	DOB:
Birthplace (City & State or Country):		
Highest Level of Education Completed:		SSN:
US Veteran:		
Spouse's Full Legal Name (if wife, list maiden name):		
Father's Name (first, middle, last):		
Mother's Full Legal Name (list maiden name):		
Occupation (former, if retired):	Industry worked:	

Next of Kin

CHILDREN'S INFORMATION

Name	Phone	Email	Address

Personal Information

Location of important papers:

Will: Y N Location:

Trust: Y N Location:

Life Insurance Policies/Annuities: Y N Location(s):

Insurance Company	Reason Purchased	Policy Number	Policy Amount

Safe Deposit Box:

Banks Accounts:

Securities Accounts:

Real Estate Owned:

Other Valuable/Meaningful Assets:

Additional Information:

ADDITIONAL INFORMATION/INSTRUCTIONS

Newspapers/memberships/subscriptions to cancel/notify:

Memorial Contributions Made To:

Other:

Personal Wishes For Funeral Service

Following a loss, a family requires healing and closure, and a meaningful funeral is a very important part of this process. A healing tribute includes three essential elements:

A gathering. A gathering allows family and friends to meet informally to give and receive love, comfort, and support from one another. The gathering may include a visitation, viewing, fellowship meal, informal memory sharing time, or any combination of the above.

A ceremony with religious or spiritual overtones. An organized ceremony offers a dignified tribute in honor of the deceased and helps the grieving family search for meaning in loss. The tribute may include religious or spiritual elements that offer hope such as readings from sacred texts, special music, meaningful letters or notes, and memories of a lasting legacy.

A procession to the final resting place. For the family, a procession is a strong symbol of unity, support, and acknowledgement that something important has occurred. There is also finality in laying the body to rest which provides a point of closure and gives loved ones a place to return to in the future to search for further meaning.

HOW DO YOU WANT TO BE REMEMBERED?

Private Family Viewing	Public Viewing	Closed Casket	Video Tribute	Memorial Display Items
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A CEREMONY WITH RELIGIOUS OR SPIRITUAL OVERTONES

Memorial Service (after burial or cremation)	Chapel Funeral Service (before burial or cremation)			
Graveside Service (burial or cremation)	Location of Service:			
Eulogy Presented By:	Other Speakers:			
Clergy:	People you do not want speaking:			
Specific Prayers:	Specific Readings:			
Other Personalization Options:				
Shiva	If Shiva, number of days and location:	Taharah	Shomer	Shroud

FOCAL POINT FOR THE SERVICE

Closed Casket	Urn	Framed Picture
Type of Casket:	Type of Urn:	
Clothing Description (if not shroud):	Jewelry	On Off
Embalming Y N	Pallbearers:	

FINAL RESTING PLACE

Burial Cremation	Cemetery / Mausoleum Property Location:		Purchased Y N
If Yes, Plot/Niche Description:	Section:	Lot No.:	Space:
If Cremation / Scattering, where do you desire to be scattered:			

CEMETERY/MAUSOLEUM

Companion	Individual	Mausoleum	Columbarium
Name of Owner of Deed:			

PERMANENT MEMORIAL MARKER

Marble	Granite	Upright	Ground Level
Inscription:			