





WILLS AND FINAL ARRANGEMENTS

When you think about it, creating a will and making final arrangements are one more opportunity to show you care. You've lived life on your own terms, why shouldn't you leave a legacy on your terms?

If you die without a will, you are said to have died "intestate." Intestacy means state law will determine what happens to the property and assets you leave behind.

Your will is your opportunity to distribute your assets as you desire, whether that's gifts to charity, a comfortable retirement for your spouse, or a head start for children, grandchildren, and others who have been important to you.

FINAL ARRANGEMENTS: REDUCE THE BURDEN FOR A GRIEVING FAMILY

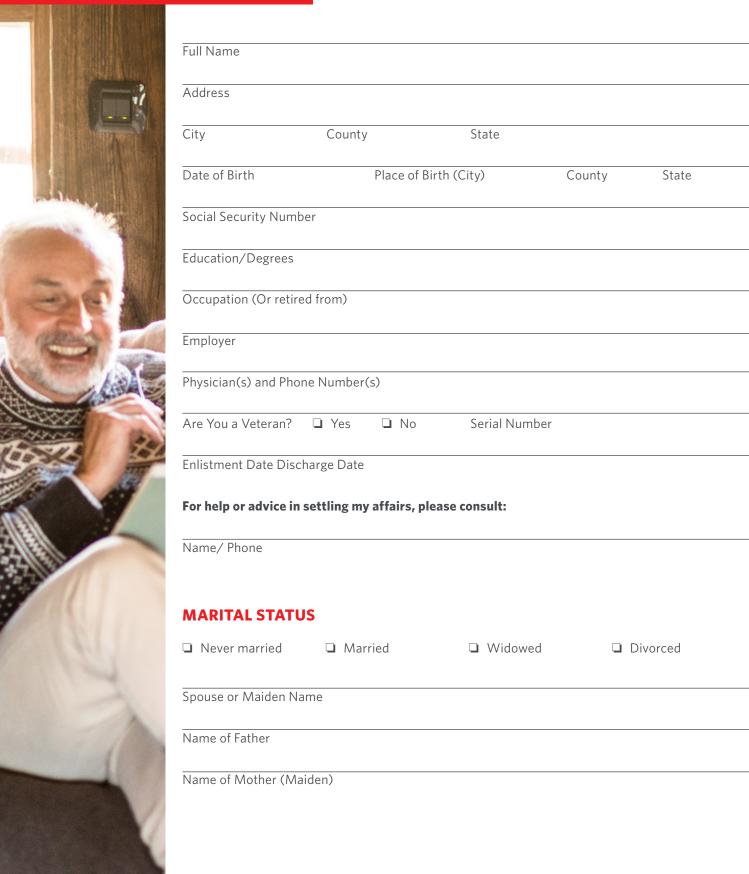
Documenting your wishes and final arrangements, often through something called a "letter of last instructions," can be one less burden for your family members as they are dealing with their grief. Putting everything in order before you pass on can help ensure your wishes are followed and leave less guesswork for those you leave behind. Including some vital information about yourself — your date of birth, hometown, occupation, degrees earned, etc. — can help your loved ones or funeral home write your obituary or death notice. You may want to discuss with your legal counsel where to store your letter of last instructions. Storing such information in a safe deposit box could be problematic if relatives are unable to access it immediately after your death.



You may want to consult a professional, such as an attorney, when creating your letter of last instruction and will.

We've provided a checklist you can fill out before taking a formal step with topics to help you get organized and thinking about what's important to you.

PERSONAL INFORMATION



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THINGS TO CONSIDER FOR A WILL

Who do you want to b	e appointed as executor	of your estate?		
☐ Husband/Wife	☐ Son/Daughter	☐ Relative	☐ Attorney	☐ None
Name				
What instructions do	you have for real estate	holdings?		
What personal effect	s do you wish to give an	d to whom?		
Item		To Whom		
Item		To Whom		
Item		To Whom		
Item		To Whom		
	ne following financial an			
☐ Will, Living Will, Po	ower of Attorney, Letter o	of Instructions		
☐ Insurance Policies				
Pension, Annuity, 4	401(k), IRA, Other Retire	ment Accounts		
☐ Bank and Credit Ca	ard Information			
☐ Tax Records				
■ Mortgage Informa	tion			
■ Social Security Car	d, Birth Certificate, Marr	iage Certificate, Divord	ce Judgement, etc.	
☐ Vehicle Titles				
☐ Location of Valuab	les (And Access Informa	tion)		
■ Additional Informa	tion			

FAMILY CHECKLIST

NOTIFY:

BEFORE THE FUNERAL ...

Attorney		

Business Associates Cemetery ☐ Florist

■ Fraternal Organizations

☐ Friends

☐ Funeral Director

■ Minister/Church

☐ Organist/Soloist

■ Relatives

Obituary

AFTER THE FUNERAL ...

NOTIFY:

Accountant

■ Financial Institutions

☐ County Recorder

□ Credit Cards

☐ Department of Motor Vehicles

☐ Insurance Agents and Companies

■ Medicare

■ Military Pension

■ Post Office

■ Social Security

■ Union

Utility Companies

■ Veteran's Organization

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FINAL ARRANGEMENTS

Name of Funeral Home			
Name of Church			
Name of Cemetery			
Burial or Cremation			
Casket or Urn Preference			
Burial Clothing	Jewelry	Other Instructions	
Reserved Facilities, Plots, or Preneed	d Contract?		
reserved racinities, riots, or riences	a Contract:		
If Yes, Provide Details, Contact			
Special Readings, Music, Songs			
Special Ceremonies (military, frater	nal order, etc.)		
Pallbearers			
Inscription			
mscription			
Send Donations To			
Special Instructions			



ONLINE INFORMATION

DEPARTMENT OF VETERANS AFFAIRS

va.gov

SOCIAL SECURITY ADMINISTRATION

ssa.gov

CREMATION ASSOCIATION OF NORTH AMERICA (CANA)

cremationassociation.org

INTERNATIONAL CEMETERY, CREMATION AND FUNERAL ASSOCIATION

iccfa.org

THE NATIONAL FUNERAL DIRECTORS ASSOCIATION

nfda.org

MEDICARE

medicare.gov

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

hhs.gov

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