

<u>Funeral</u>

I would like the following individual(s) to manage my final affairs regarding my funeral arrangements:
Please notify:
I would like to be laid to rest as followed: (cremated, buried, location, service, church, flowers, etc.)
If arrangements have been made and/or paid for:
My wishes for organ donation:
My wishes for memorial gifts:

Obituary Information

Important facts (hobbies, organizations, family, etc.	.)
was born (date & location): My occupation:	
Gender: Social Security Number:	Married: Y/N Prior Marriages: Y/N
Veteran Status:	
Spouses Name:	
Born (date & location):	
Living or deceased (date & location):	
Forth and Maria	
Fathers Name: Born (date & location):	
Living or deceased (date & location):	
Additional Notes:	
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Financial Affairs

	(birth certificate, driv	ver's license, will, trust, marria	ge license, etc.)
My delegate to	handle my final request	s and financial affairs:	
My advisors (c	ircle primary contact to c	ssist in handling affairs):	
Financial Advis	or: (name)	(phone)	(firm)
Attorney:	(name)	(phone)	(firm)
Accountant:	(name)	(phone)	(firm)
Other:	(name)	(phone)	(firm)
lmportant Con	tacts: (beneficiaries, exec	cutors, trustees, etc.)	
'name)	(phone)	(address)	
name)	(phone)	(address)	
'name)	(phone)	(address)	
name)	(phone)	(address)	<u> </u>
	can be found:	uto, etc.)	
	Firm:	Contact:	Phone:
Туре:			
		Contact:	Phone:
Туре:	Firm:	Contact:	
Туре:	Firm: Firm:		Phone:

My Bank Accounts: (checking, savings, CD's) Type: _____ Firm: ____ Contact: ____ Phone: ____ Firm: _____ Contact: ____ Phone: _____ Firm: Contact: Phone: Firm: _____ Contact: _____ Phone: ___ Firm: _____ Contact: _____ My statements are located: Beneficiaries: Notes: My Investment Accounts: (brokerage, IRA, mutual funds, employer plans, pension) _____ Firm: _____ Contact: ___ Phone: ___ Firm: _____ Contact: ____ Phone: Firm: _____ Contact: _____ Phone: ____ Firm: Contact: Phone: ___ Firm: Contact: Phone: My statements are located: Beneficiaries: Notes: My Held Assets: (savings bonds, stock certificates, safe deposit boxes, collectibles, home, auto, etc.) Location: _____ Wishes: _____ Location: Wishes: Location: _____ Wishes: __ Location: _____ Wishes: ___ Location: Wishes: Location: Wishes: _____ Wishes: ___ Location: Location: Wishes:

Location: _____ Wishes: ____

My statements	are located:		
My statements	are located:		
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Wy Statements			
	o Account Information		
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Additional Instructions & Notes
Message to Loved Ones
<u>5-162240ffe to 20 y est 0 1025</u>

NAVIGATE HOME

For additional information and resources, please visit our website at www.navigatehomepros.org.

