

Personal Planning Guide

For Peace Of Mind



This booklet should be kept in a place where it will be immediately available at the time of your death.

Also, if you have made any arrangements with a funeral home, we recommend that you have them keep a copy of this information with your confidential file.

DO NOT KEEP THIS BOOKLET IN A SAFE DEPOSIT BOX.

The Will

How To Make A Will

Call your lawyer and make an appointment. Make a list of the full names and birthdays of your wife or husband, children, parents, brothers and sisters. Then write out a list of all your property and prepare a brief outline of what you want to do with it. If it is a simple Will, he can probably dictate it to his secretary while you wait. Ask him who to use as witnesses. Be sure that none of those you use as witnesses are mentioned in the Will. Witnesses should be younger than you, in good health, should have known you for a long time and live nearby.

Preservation Of Your Will

After you are gone, someone will have the task of probating your Will and carrying out its provisions. By completing the information in this booklet you will make it easier for your family, telling them where to find your Will, the affidavits signed by the witnesses to the Will, a list of your real estate, bank accounts, stocks, bonds, safe deposit box, insurance policies, cemetery property and your birth certificate. Add to the list the name of your lawyer and minister as well. Each of these is valuable.

You should keep your Will in a location well known to your family. If you choose to keep it in a safe deposit box, check with your bank concerning your state's regulations regarding removal of the will.

Probating The Will

The Executor of your Will should engage a competent attorney to probate the Will, as this is a technical matter which requires the services of a lawyer. The process of probating a will and settling an estate takes a period of time, the length of which depends on state laws.

To My Family

The information contained in this booklet is for your peace of mind and my own. For yours, because I sincerely believe that it will spare everyone unnecessary distress at the time of my death. My own, because it means a great deal to me to know that I have taken steps to eliminate as much of the burden of decision making from you, as possible.

I have completed this information with much love and thought, feeling that it would cause greater distress if these decisions were left for you to make with no indication of my wishes.

I sincerely hope you will find my wishes in accordance with your own, and that the information contained in this booklet will ease your burden as much as possible. After all, that was my sincerest intention.

Date _____

Signature _____

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Social Security Instructions

Location of nearest Social Security office is:

City _____ State _____

To facilitate receiving Social Security benefits you will need the following when you contact the Social Security office:

1. Marriage certificate
2. Children's birth certificates
3. Proof of widow's age if 62 or older
4. Social Security number
5. Total wages paid on W-2 form or schedule "C" for preceding year
6. Death certificate

Social Security pays a lump sum death benefit of \$255 if qualification is met.* The amount, if any, of monthly survivor benefits will be determined by past earnings.

It usually requires about three (3) months for a widow to start obtaining Social Security benefits.

Your funeral director can be helpful in coordinating Social Security benefits, insurance benefits, and any Veteran's benefits.

*According to Social Security Administration Rules & Regulations 404.390

Veteran's Benefits

Location of nearest Veteran's Administration Office is:

City _____ State _____

To facilitate receiving Veteran's Benefits, you will need the following when you contact the Veteran's Administration Office:

1. A copy of my Death Certificate
2. Proof of Widowhood - Proof of our marriage should be established by one of the following kinds of evidence, in this order of preference:
 - a. A properly certified copy of the public or church record of our marriage
 - b. Affidavit of clergyman or magistrate who performed the ceremony
 - c. Original marriage certificate
 - d. Affidavits of at least two eye-witnesses to the ceremony
3. Proof of Termination of Marriage - the termination of all marriages contracted by either of us should be substantiated by certified copies of the final decrees of divorce or annulment, or by proof of death.
4. Proof of Age and Relationship of Child(ren) - To establish the fact of the birth of each child, you should supply a birth certificate or a properly certified copy of the church record of birth or baptism showing the date and the names of the parents.

A Veteran is generally entitled to the following benefits:

1. Burial Flag
2. Headstone or Grave Marker

Apply to any Veteran's Administration Office, and inquire there about any additional benefits to which you may be entitled.

You should have a copy of your Veteran's discharge papers on file in the funeral home.

Your funeral director can be helpful in coordinating social security benefits, insurance benefits and any Veteran's Benefits.

Vital Statistics

Date _____

Name _____
First Middle Last

Address _____
Street City State

Birthplace _____
City State

Date of Birth _____

Social Security Number _____

Usual Occupation _____

Kind of Business or Industry _____

Education: (ck. highest completed) Elem./Secondary _____
College (1-4 or 5+) _____

If Veteran, Name of War _____ Claim Number _____

Dates of Service _____

Branch of Service and Rank _____

Service Serial Number _____

Location of Discharge Papers (DD214) _____

Marital status: Married___ Single___ Divorced___ Widow(er)___

Name of Spouse _____

Name of Father _____

Mother's Maiden Name _____

The information above will be necessary for the preparation of a death certificate. The Funeral Director will record it and have certified copies made. You will probably need several copies.

Memorial Instructions

The first thing to do following my death is to make arrangements with my Funeral Director.

☐ I have arrangements on file with _____ Funeral Home.

☐ Pre-arrangements have not been made. The following arrangements are in accordance with my wishes:

Funeral Home _____

Funeral Director _____

Address _____

Phone Number _____

FUNERAL

Type of Service

- ☐ traditional
church _____
chapel _____
☐ immediate burial
(no service)

- ☐ grave side
☐ direct cremation
☐ other _____

Active pallbearers

Honorary pallbearers

Type of Casket:

- ☐ Wood _____ ☐ Metal _____

Viewing

- ☐ Yes ☐ No

(visitation)

- ☐ Open Casket ☐ Closed Casket
☐ Traditional
(evening visitation)

Clothing

- ☐ My Own ☐ New _____

Newspaper Notice

- ☐ Yes ☐ No

Memorial contributions may be made to: _____

☐ OK to send flowers / preferred florist: _____

Clergyman desired: _____

BURIAL

[illegible]

Cemetery Name _____

☐ Own Lot # _____ Deed Location _____

☐ Do Not Own

Vault ☐ Yes ☐ No

Type of Vault ☐ Concrete ☐ Steel ☐ Other_____

SPECIAL INSTRUCTIONS

I have noted here personal requests such as clothing, jewelry, music selections, glasses, flowers, hairdresser, etc., which are important to me.

BIOGRAPHICAL INFORMATION

(Church Membership, Fraternal Organizations, Civic Clubs, etc.)

Address (city)

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Documents & Personal Papers

Bank Accounts

Name of Bank

Type of Account

Name of Attorney _____

Address _____

Phone number _____

Safe Deposit Box

Location _____

Location of keys for above _____

Important Document Locations

Birth Certificate _____

Children's Birth Certificates _____

Marriage Certificate _____

Deeds and Titles _____

Mortgages and Notes _____

Will _____

Military Discharge (DD-214) _____

Income Tax Records _____

Other Documents _____

Insurance Instructions

I have purchased the following insurance policies for the reasons set forth:

Company _____

Policy Number _____ Amount \$ _____

Reason Purchased _____

Company _____

Policy Number _____ Amount \$ _____

Reason Purchased _____

Company _____

Policy Number _____ Amount \$ _____

Reason Purchased _____

Company _____

Policy Number _____ Amount \$ _____

Reason Purchased _____

Company _____

Policy Number _____ Amount \$ _____

Reason Purchased _____

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Insurance coverage provided by National Guardian Life Insurance Company. National Guardian Life Insurance Company is not affiliated with the Guardian Life Insurance Company of America, a/k/a The Guardian or Guardian Life.

Texas Residents: The Texas Department of Banking provides consumers with additional information on the purchase of prepaid funeral benefits. See their website at www.prepaidfunerals.texas.gov
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