



My Journal

Name:

Date:

My Signature:

We suggest you handwrite this journal – as a memento for your future generations

Having plans in order means gaining peace of mind

This planning guide was designed to help you record & organize your important personal information and thoughts. Making final plans now is one of the most thoughtful gifts you can give your family.

This Personal Planning guide when completed will contain information of a confidential and private nature. We recommend storing this guide in a safe and secure place where it can be accessed by your loved ones in time of need.



Service Preferences

A memorial service is a time for family to gather and remember. When you plan your service in advance, your tribute can be an unique and personal reflection of you.

Preferred Funeral Home

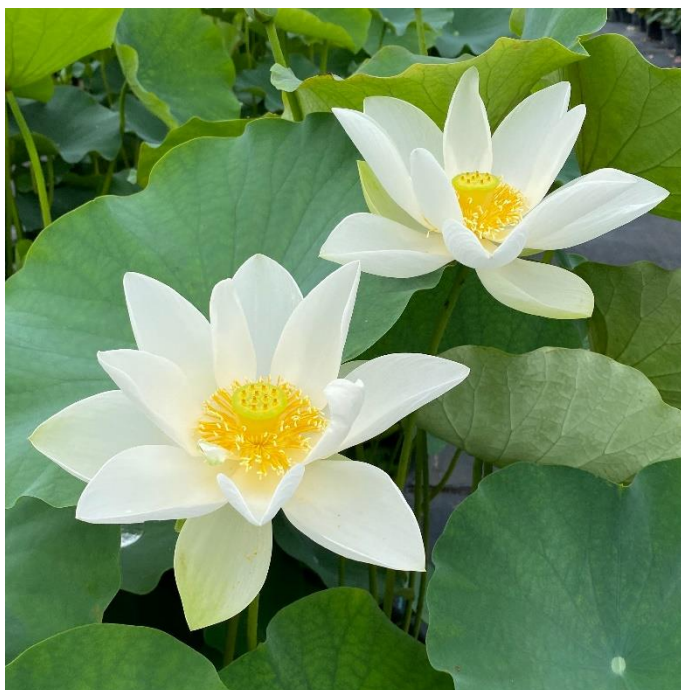
Name: _____

Address: _____

Preference: Cremation _____ Non Cremation _____

Type of service: Traditional _____ Religious _____ Simple _____

Place of service: Church/Temple: _____



Your Legacy

My fondest childhood memories:

My earliest ambitions:

Things that make me smile:

My proudest family moments:

My proudest career accomplishments:

Special achievements/awards/offices held/additional points of interest and memories

My favorite songs:

My favorite color:

Pastimes and hobbies I enjoy:

Other favorite things:

My wish for my kids:

My wish for my grandkids:

My wish for the spouses of my kids:

I want you to remember me by:

Genealogy/Family History

This page will serve as a reference and reminder of your unique image

Family of:

Name: -----

My Fathers name: -----

My father's father's name: -----

My father's mother's name: -----

My Mother's name: -----

My Mother's father's name: -----

My Mother's mother's name: -----

My brother's name: -----

My brother's name: -----

My brother's name: -----

My brother's name: -----

My sister's name: -----

My sister's name: -----

My sister's name: -----

My sister's name: -----

My spouse's name: -----

My children's names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My grandchild/spouse names: -----

My closest relative is: _____

Financial Information

Banking:

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Bank Name: _____ Branch _____

Type of account: _____

Account number _____ User Name _____ PW _____

Credit cards

Name of card : _____

Account number: _____ Exp _____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp _____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp_____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp_____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp_____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp_____

URL: _____ User Name: _____ PW _____

Name of card : _____

Account number: _____ Exp_____

URL: _____ User Name: _____ PW _____

Life insurance /Benefits

Location of policy: _____

Type of Policy: _____

Name of Company: _____

Phone: _____

Policy Number: _____

Beneficiary: _____

Amount: _____

Real Estate Holdings:

Description: _____

Address: _____

Deed Location: _____

Description: _____

Address: _____

Deed Location: _____

Financial assets:

Type/Description: _____

Location: _____

Company Contact: _____ Phone: _____

Personal Requests: _____

Type/Description: _____

Location: _____

Company Contact: _____ Phone: _____

Personal Requests: _____

Type/Description: _____

Location: _____

Company Contact: _____ Phone: _____

Personal Requests: _____

Other loan information:

My Estate plan and will : Location: _____

Share your plan with those closest to you

It is important to let those closest to you to know that you have recorded your final wishes and personal information.

Please keep your completed planner in a safe but familiar place and let others know where it is located.

To all my loved ones

It is my wish that my final goodbye is a reflection of all I have been and loved.

This planner includes personal information and details concerning my final arrangements

Please know that it was thoughtfully prepared with you in mind.

I hope these pages will relieve you of

some unnecessary stress and guesswork at the time of my passing.

I also hope these pages serve as a lasting memory of my life.

To my cherished family and dear friends, I leave these thoughts and my love.

[illegible]

[illegible]