

Estate Planning Information

Funeral Arrangements

Which funeral home?

Have you pre-paid for funeral services?

Have you purchased a cemetery lot or crypt?

Where are services to be held?

Officiating clergy:

Do you wish military services?

Do you wish fraternal services?

Who to contact regarding military or fraternal services:

Name: _____ Telephone number: _____

What cemetery?

Location of deed?

Pall bearers:

Special arrangements:

Biographical Information

Your full name:

Your address:

Resident of this city since:

Place of birth:

Date of birth:

Social Security No.:

Occupation:

Employer:

If retired, what year retired:

Marital status:

Name of your spouse:

If your spouse is deceased, what year he/she died:

Your father's name:

Father's Place of birth:

Year he was born:

Your mother's maiden name:			
Mother's Place of birth:		Year she was born:	
List your children:			
Name	Telephone Number	City	
Fraternal, service and other organizations to which you belong:			
Military service:			
List friends and relatives you wish to be notified of your death:			
Name	Relationship	City	Phone No.
Where you were educated:			
Your church or religious affiliation:			
Name	City	Are you a member?_	

Estate Information

Location of will:

Executor:

Name

Address

Attorney:

Name

Address

Accountant:

Name

Address

Bank/Savings & Loan/Credit Union accounts (including certificates of deposit):

Account number

Institution

Branch

Life Insurance Policies:

Policy number

Company

Location of Policy

Stock, Bonds, Mutual Funds, Securities:

No. Shares/ Amount

Company

Where Located

Real estate owned: Description of Property Located		Where Deed is
Vehicles Owned: License No.	Year/Make	Location of Title
Location of documents: Military discharge certificate: _____ Marriage certificate: _____ Income tax returns: _____		
Brokers:		
Pension, Retirement IRA, Keogh, other benefits payable on death:		
Safety Deposit Box:		Where located: