



# FINAL WISHES & PLANNING KIT



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# FINAL WISHES & PLANNING KIT

See what's included ...



## **My Life. My Wishes.**

A keepsake of cherished memories and final requests

This is a gift your family will appreciate and cherish for years to come. Use it to:

- Record and share your life story with family and loved ones
- Express how you wish to be remembered after you're gone
- Record financial documents and other important information your family may one day need to handle your affairs

Once you've completed the booklet, give it to a loved one or keep it with your other important papers.



## **After a Loved One Dies**

A planning checklist

At a time when families are distressed and grieving, the many decisions and plans that need to be made after the death of a loved one can feel overwhelming.

This checklist guides you through the steps that must be taken immediately after someone dies, and outlines the final arrangements you'll need to make in the days that follow.

If you choose to preplan your funeral, you can use this checklist as a guideline to help make sure your final wishes are carried out.

**Questions? Give us a call at  
1-800-325-7500**



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# MY LIFE. MY WISHES.



A keepsake of cherished memories  
and final requests



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# MY LIFE. MY WISHES.

This booklet offers a special place to record and share your life story with family and loved ones. Take your time, complete as much as you want – the parts most important to you.

In addition, this booklet provides a convenient place to express how you wish to be remembered after you're gone. There's even a place to record financial documents and other important information your family may one day need to handle your affairs.

Once you've completed the booklet, give it to a loved one or keep it with your other important papers.

This is a keepsake your family will appreciate and cherish for years to come.

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**This information will be important for your family. It can help them get started and provide the details they'll need along the way.**

Name (legal) \_\_\_\_\_ (maiden) \_\_\_\_\_

Nickname \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Date completed \_\_\_\_\_



# MY LIFE. family

**Favorite memories of my family  
(parents and siblings)**

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**Favorite family traditions**

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**Favorite memories of where I grew up**

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**My favorite family vacation memories**

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**Where and how I met my  
spouse/significant other**

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**Favorite memories of my children as they were  
growing up**

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**Fondest memories of our family pet(s)**

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# MY WISHES. final arrangements

My services are preplanned. Contact

.....  
Name

.....  
Phone number

**My preplanning documents are located**

.....  
.....  
.....

My services are not preplanned. My funeral home preference is

.....  
Name

.....  
Phone number

I wish to be: Buried  Cremated

Burial wishes (e.g. cemetery, location, ashes)

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.....  
.....

I have purchased a plot: Yes  No

My plot location

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.....  
.....  
.....

**My place of worship**

.....  
Name of church, synagogue, house of worship

.....  
Religious contact

.....  
Address

.....  
Phone number

**My memorial ceremony preferences** (e.g., wake, funeral mass, memorial service, rosary, graveside service, open/closed casket, no ceremony)

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**Personal information for obituary** (e.g., military service, degrees, honors)

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**Memorial contributions should be sent to** (e.g., favorite charities or organizations)

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# MY WISHES. final arrangements

**My favorite flowers**

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**Songs or music I like**

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**Special quotes or poems I like**

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**My favorite readings, psalms and prayers**

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**Person(s) I would like to do the readings**

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**Memorial card:** Yes  No

**Other special notes or requests** (e.g., clothing, jewelry, personal items to be buried with)

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# IMPORTANT INFORMATION

## Personal

.....  
Date of birth

.....  
Mother's full maiden name

.....  
State and county of birth

.....  
Father's full name

.....  
Social Security number (or where it can be found)

.....  
Person who will handle my affairs/beneficiary

.....  
Education/degree

.....  
Phone number

.....  
Occupation

.....  
Attorney

.....  
Phone number

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**Place(s) where I keep bank statements, deeds or other important financial records**

**My birth certificate, marriage certificate, divorce documents, military discharge papers, tax returns and other important documents are located**

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# IMPORTANT INFORMATION

## Financial

I have a will or trust: Yes  No

Location

The combination for my safe is known by

I have a safety deposit box: Yes  No

Company name

Box number and location of keys

I have a life insurance policy(ies)

Insurance company

Location of policy

Insurance company

Location of policy

My beneficiary(ies)

Other insurance policies I have (e.g., auto, homeowners/renters, health, dental)

Insurance company and type of coverage

Location of policy

Insurance company and type of coverage

Location of policy

Insurance company and type of coverage

Location of policy

Insurance company and type of coverage

Location of policy

I have a mortgage or deed to my home

Yes  No

Name of lender

I have a second mortgage on my home

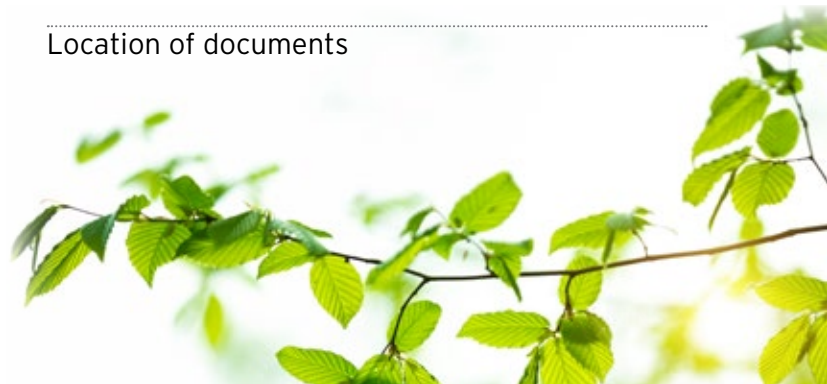
Yes  No

Name of lender

I have an auto registration/title

Yes  No

Location of documents



# IMPORTANT INFORMATION

## Financial

I have a retirement account(s) Yes  No

.....  
Company/contact

.....  
Phone number

.....  
Company/contact

.....  
Phone number

.....  
Company/contact

.....  
Phone number

I have these financial accounts

Checking  Savings  Credit Card  Other

.....  
Bank name and location

Checking  Savings  Credit Card  Other

.....  
Bank name and location

Checking  Savings  Credit Card  Other

.....  
Bank name and location

Checking  Savings  Credit Card  Other

.....  
Bank name and location

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## Online and Social Media

My email address(es)

.....  
.....  
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Usernames and passwords for my online accounts, computers and phones (or the place where these can be found)

.....  
.....  
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.....  
.....

I have these social media accounts

Facebook  LinkedIn  
 Pinterest  Instagram  
 Twitter  Other .....

Other .....

# AFTER A LOVED ONE DIES



A planning checklist to guide you through the steps to take following a loved one's passing



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# AFTER A LOVED ONE DIES

The death of a loved one is distressing, no matter if it's sudden or comes after a lengthy illness. At a time when families are grieving and emotions are running high, they can feel overwhelmed by the many decisions and plans that need to be made.

In the event you're faced with the loss of a loved one, you can use this checklist to help guide you through the steps that must be taken immediately, along with final arrangements you'll need to make in the days that follow.

Many final arrangements can be planned in advance – or preplanned – through a funeral home. By letting your wishes be known and preplanning your funeral, you can help ease the burden on your family when the time comes. If you decide to preplan, use this checklist as a guideline to help make sure your final wishes are carried out.



**Use this checklist to guide you through the immediate steps to take and the final planning process following the death of a loved one.**

# IMMEDIATELY

## General guidelines

### Get a legal pronouncement of death

- If death was expected and occurs at home under hospice care, call hospice nurse
- If death was expected and occurs at home without hospice care, call the person's doctor
- If death occurs at home and was unexpected, call 911 (medical team will help determine next steps and whether or not a coroner is needed)
- If death occurs in a care facility, attending staff will provide

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### Arrange for transportation of body

- If no autopsy is needed, call funeral home of choice
- If autopsy is needed, coroner will arrange
- If death occurs in a care facility, the staff will usually call the funeral home of choice, or, when needed, arrange for an autopsy

### Call the person's doctor (if not already notified)

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### Notify close family, friends and clergy

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### Arrange for care of dependents and pets

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### Notify person's employer, if employed

- Request information about benefits and any pay due
- Ask if the person had life insurance through work

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# WITHIN A FEW DAYS

## General preparations

- Find out if person had a prepaid funeral plan and/or individual life insurance policy
  - Locate any estate-planning documents (will, trust, etc.)
  - Gather vital statistics, personal information, military or veteran information, achievements and other highlights for obituary and eulogy
  - Identify a charity donations can be directed to, if desired
- 

## Funeral home arrangements

Following are items you'll need to consider, whether you preplan or not.

A funeral home will walk you through your choices and help you with these details.

### Select a funeral home (if not already done)

- Choose the type of service (religious, military, fraternal, etc.)
- Make decisions about a wake, visitation and family viewing
- Select the location(s) of service or viewing
- Choose burial, cremation or entombment
- Select a casket or cremation urn
- Select a burial vault
- Select floral arrangements
- Select photographs for display and/or a memorial video
- Choose memento items to be displayed
- Select what the deceased will wear
- Identify jewelry that is to remain or be returned
- Select music, hymns and solos

- Select scripture or literature to be read
  - Select a memorial register book
  - Choose memorial folders and acknowledgment cards
  - Determine transportation: funeral coach, clergy car, family limousine, pallbearer limousine, flower car
- 

### Select participants

- Contact clergy, celebrant or officiant who will preside at service
- Arrange for organist, pianist and/or vocalist(s)
- Select pallbearers
- Select family member(s) and/or friend(s) to deliver eulogy
- Select family member(s) and/or friend(s) to read scripture or literature

# WITHIN A FEW DAYS

## Cemetery and burial location

- Choose a cemetery
  - Decide on the type of cemetery (public, religious, municipal, veterans', etc.)
- Select a burial or cremation plot
- Select a memorial or grave marker and inscription

## Final arrangements at time of need

- Set a time and date for the funeral
- Compose and submit obituary
- Arrange location and food for reception
- Apply for death certificates

## Miscellaneous

- Cancel credit cards and driver's license
- Notify any banks, credit unions, mortgage companies and lenders
- Notify insurance companies
- If receiving Social Security, notify Social Security Administration (800-772-1213)
- Deactivate any social media accounts (check each platform's terms of service for specific rules and instructions)
- Cancel newspaper delivery and gather mail
- Send thank-you cards



While planning a funeral at a time when you're grieving can feel overwhelming, celebrating the life of your loved one can bring great comfort – along with knowing the love and memories you hold will live on.

### Sources:

"Funeral Planning Checklist," National Caregivers Library, [caregiverslibrary.org](http://caregiverslibrary.org), accessed March 6, 2018

"What Should You Do If Someone Dies At Home?", excerpted from article by Carol Hardy in Spring 2015 newsletter, Funeral Consumers Alliance of the Finger Lakes, [fingerlakesfunerals.org](http://fingerlakesfunerals.org), accessed March 12, 2018

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