

My Wishes Record Keeper



ENCORE FINANCIAL GROUP
Your goals, our mission.

Michigan • Florida • Pennsylvania

For assistance or additional information please call our office at: 231.627.1023

www.encorefinancialgroup.net

Introduction

We created the *My Wishes Record Keeper* booklet, along with the *Peace of Mind Checklist*, to be a simple tool for organizing your wishes and important information from your life. We encourage you to share this with your close family members. This may be one of the easiest, but most valuable gifts you can provide your loved ones.

To My Family

I know this will be difficult time for you. Upon my death, you will be asked to make numerous decisions and attend to countless details. My intent is to help ease the burden that has fallen on your shoulders. So I have attempted to provide you with the information you will need to put my affairs in order and to let you know my final wishes.

I thank you with all of my heart for your love and willingness to carry out these final tasks in my behalf.

Signature

Date

About me

This is information the funeral home may need to create my obituary.

Full Name (including maiden name): _____

Address: _____

Birth Date: _____ *Birthplace (city, state)* _____

Spouse's Full Name: _____

Religious Affiliation: _____

Employment Information:

Clubs & Organizations:

Education:

Other Biographical Information:

Military Record:

Branch of Service: _____

Serial Number: _____

Rank: _____

Dates of Service: _____

Surviving Relatives:

Name:

Relationship:

Residence:

Important People

These are the relatives, friends, and acquaintances I would like you to notify.

Name:

Relationship:

Phone:

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
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_____	_____	_____
_____	_____	_____
_____	_____	_____

Important Papers

Here is where you will find the important papers and documents you may need to settle my affairs.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

Safety Deposit Box:

Location: _____ *Box Number:* _____

Location of Key(s): _____

Locations of:

Will: _____

Trust: _____

Social Security card: _____

Military Records: _____

Insurance Policies: _____

Pension & Retirement Plan Documents: _____

Income Tax Documents: _____

Stocks & Bonds: _____

Property Deeds or Mortgage Documents: _____

Rental and/or Lease Agreements

Automobile Titles: _____

Important Papers- continued

Birth Certificate: _____

Marriage Certificate: _____

Electronic passwords: _____

Other: _____

My Key Advisors

These are the people I relied on and whom you can count on for help and guidance.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

Name:

Phone:

Attorney: _____

Power of Attorney: _____

Executor of Estate: _____

Accountant: _____

Financial Advisor: _____

Insurance Agent: _____

Physician: _____

Other: _____

Other: _____

Other: _____

My Finances

These are the places where I have financial dealings.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

<i>Financial Institution</i>	<i>Account Number</i>
<i>Checking Account:</i> _____	_____
<i>Checking Account:</i> _____	_____
<i>Savings Account:</i> _____	_____
<i>Savings Account:</i> _____	_____
<i>Investment Account:</i> _____	_____
<i>Investment Account:</i> _____	_____
<i>Loan:</i> _____	_____
<i>Loan:</i> _____	_____
<i>Credit Card:</i> _____	_____
<i>Credit Card:</i> _____	_____
<i>Other:</i> _____	_____
<i>Other:</i> _____	_____

My Memorial Service

Here are my wishes for my memorial service and final resting place.

Funeral Home: _____ Pre-arrangements: ___Yes ___No

Type of Service: _____

Desired Location: _____

Clergyman or Officiant: _____ Phone: _____

Pallbearers: _____

Special Requests

Clothing: _____

Viewing: _____

Eulogy: _____

Music: _____

Prayers or Readings: _____

Flowers: _____

Donations: _____

Preferred Cemetery or Mausoleum: _____

Plot Purchased: ___Yes ___No Location: _____

Headstone or Monument: _____

Inscription: _____

My Memorial Service- continued

Special Requests or Instructions:

One Last Wish

This is what I would like my family and friends to remember about me.

My Early Life:

My Hopes & Dreams:

My Career:

My Hobbies & Interests:

One Last Wish- continued

My Travels:

My Favorite Places:

My Greatest Accomplishment:

My Fondest Memories:

Notes

Notes

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