

# *Personal Planning Guide*

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*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*

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## **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*

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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 \_\_\_\_\_



# *Social Security Instructions*

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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*

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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                       grave side  
   church \_\_\_\_\_                       direct cremation  
   chapel \_\_\_\_\_                       other \_\_\_\_\_  
 immediate burial  
(no service)

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: \_\_\_\_\_





# *Documents & Personal Papers*

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## **Bank Accounts**

Name of Bank

Type of Account

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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*

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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](http://www.prepaidfunerals.texas.gov)  
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