



PREPARING FOR 'THE TALK'

Organizing Your Present and End of Life Wishes Now for Those You Leave Behind Later

Our death is often a subject that friends and relatives avoid having a conversation about. But the reality is....death is inevitable. There's no getting around it, there is no denying it. The fact is that we will all die someday. Because of this inevitable fact, **the blessing you can leave behind for your loved ones is to plan for all those things they need to know upon your death now so their lives will be easier, the things they need to know will be at their fingertips, your wishes will be known, and they will feel more organized when that time comes.**

This resource will help you plan for 'the talk' with family and/or friends as well as help you organize the big and small details of your life your loved ones need to know; from the funeral home you want to use, financial and banking information, right down to reminding those left behind to empty the garbage cans and remove perishables in the refrigerator before the house begins to take on an odor. This resource is designed to help you, and those you love, have peace of mind because all the little details they need to know are easily accessible when they need it.

**Are you ready for the journey to begin so we can get 'the talk' ready to go with your loved ones?
Let's get started!**

You may fill out this form online and save it in your personal files, or you may print a hard copy to write on or use as a guide. Whatever you are most comfortable with.

Date: _____ Date Last Updated: _____

Full Name: _____

Birthdate: _____

Current Address: _____

Social Security #: _____

Single / Married / Widowed / Divorced: _____

Spouse (Even if deceased): _____

Spouse's Social Security #: _____

Spouse's Birthdate: _____

Children's Names: _____ Birthdate: _____

Children's Names: _____ Birthdate: _____

Children's Names: _____ Birthdate: _____

Children's Names: _____ Birthdate: _____

Children's Names: _____ Birthdate: _____

Children's Names: _____ Birthdate: _____

Additional Information: _____

STEP 1 – FUNERAL HOME AND MEMORIAL SERVICE INFORMATION

Name and number of Funeral Home _____

Place of burial and contact information _____

Has your funeral and burial arrangements been prepaid Yes _____ No _____

Funeral Service Wishes

I want my body shown for calling hours Yes _____ No _____

I want to be buried Yes _____ No _____

I want to be cremated Yes _____ No _____

I want a full service for my funeral/celebration of life Yes _____ No _____

I want only a graveside service Yes _____ No _____

I want to leave the service decisions up to my family Yes _____ No _____

I want the service at the funeral home Yes _____ No _____

I want the service to be held at my place of worship Yes _____ No _____

Name of place of worship _____

Have you shared your funeral preferences with your pastor, priest, or rabbi? Yes _____ No _____

Are you a veteran? Yes _____ No _____

Would you like military honors at the service? Yes _____ No _____

What is your DD214# on your discharge papers? _____

Details about my Funeral/Celebration of Life

The name and contact information of the person I would like to officiate the service _____

Others who I would like to participate in the service and how _____

Hymns/songs that I would like sung _____

Special Music _____

Scripture passage that is important to me _____

Organization or charity donation in lieu of flowers _____

Other details I would like to share _____

STEP 2 – FINANCIAL DETAILS

Life insurance policies with contact information _____

Location of original insurance documents _____

Banking and Loan Name and Contact Info _____

Location of Bank and Outstanding Loan(s) Account Numbers _____

Pension(s) and contact information _____

Financial Advisor Name and Contact Information _____

Employer Name and Contact Information _____

Additional Information _____

STEP 3 – PERSONAL INFORMATION

Make a list of all Usernames and Passwords for all online accounts. Examples:

Phone password – *Don't forget this one! Our life is on our phones!* _____

Computer or laptop username and password _____

Banking username and password along with code word and/or security question answers if needed for identification purposes_____

Social media username and password – Facebook, TikTok, Instagram, Twitter, LinkedIn etc._____

Email username and password _____

Online payment username and passwords for utilities and loans _____

Apple ID _____

Amazon username and password _____

Garage door or security system _____

Home safe _____

Car Keypad _____

External storage unit passcode or location of key _____

Additional username and passwords _____

Passwords and Usernames SECURE document location _____

Location of important phone numbers. Examples:

Veterinarian _____ Best Friend _____

Primary Care Physician _____ Companion _____

Physician specialists _____ Electrician _____

Dentist _____ Plumber _____

Hair Stylist _____ HVAC company _____

Additional _____ Additional _____

Location of Important Documents (with combination if in a safe). Examples:

Will or Trust Documents _____

Birth Certificate _____

Social Security Card _____

Divorce papers _____

Deeds for mortgage, cars, boats etc. _____

Tax records _____

Passport _____

Additional documents _____

Healthcare Documents such as:

Advanced Directives _____

Durable Power of Attorney _____

DNR documents _____

Emergency Contacts _____

WHEN DEATH OCCURS – WHAT TO DO NEXT

*****If an organ donor – If death occurs at home notify medical staff or call 911 immediately***

Notifications

Notify funeral home of death

Secure the home and any valuables within the home

Notify family and friends – Contact info located here:

Notify employer

Notify attorney

Notify financial advisor

Notify Social Security

Notify post office of death and forward mail to desired point person

Pets: Arrange for pets to be fed and watered until arrangements can be made for their new home

Cancellations

Cancel all credit cards – Examples: Visa, Mastercard, Kohls, Gas Cards

Cancel automatic deductions to a bank account or debit/credit card such as:

- Memberships: YMCA, Planet Fitness, Costco, Amazon Prime, AAA, Chewy.com
- Apple memory storage, etc.
- Streaming services: Netflix, Hulu, Peacock, HBO, Amazon Music, Spotify
- Cable or Dish service
- Car wash services
- Cell phone service (download any digital pictures or videos prior to cancelling)
- Magazine subscriptions (online or via mail)
- Grocery or medication delivery service
- Security system monitoring service
- Cleaning services
- Garbage removal services

Helpful hint: A printout of a bank or credit card statement is very helpful for this list

Delete email accounts once you are **SURE nothing is coming in that you may need later**

Cancel Outstanding appointments. Examples:

Doctor, dentist, haircut

Don't Forget These!

- Clean out refrigerator of perishable items
- Remove any garbage throughout the home
- Wash and dry laundry that may mold or mildew or otherwise cause an odor