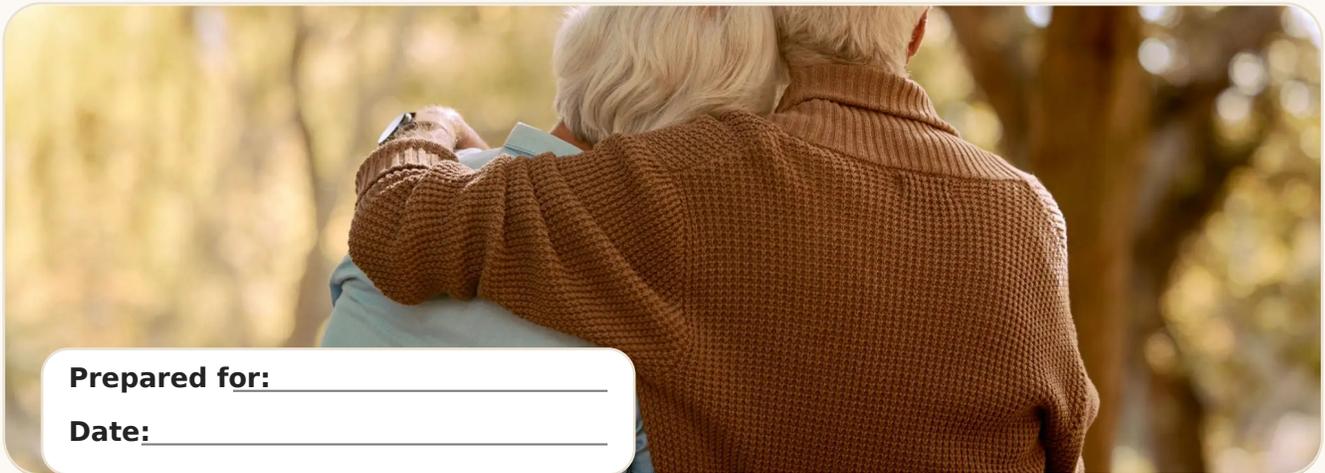


Planning Ahead Guidebook

A practical workbook to help your family know what to do, and where to find it.



What this guide helps you organize

- Vital statistics and important documents
- Personal information and life history details
- Newspaper/obituary information (if needed)
- Funeral and cemetery preferences
- Key contacts: attorneys, banks, doctors, and other advisors
- Digital access & account recovery notes (without listing passwords)
- Relatives & friends to notify

How to use this workbook

Complete it once, then review it once a year (or whenever something changes). Keep it in a safe, easy-to-find place, and make sure at least two trusted family members know where it is stored.

Vital Statistics

Identity & Contact

Name _____
 Address _____

 Phone _____
 Email _____
 Social Security # _____
 Date of birth _____
 Place of birth _____
 Medicare # _____

Family & Military

Name of spouse _____
 Wedding date _____
 Father's name / place of birth _____
 Mother's name / place of birth _____
 Military branch / era _____
 Service number / rank _____
 DD-214 location _____

First 24 Hours

Primary point person (name + phone): _____
 Will / trust location: _____
 Final Expense policy location: _____
 Who will secure the home? _____
 Who will watch / take pets? _____

Important Documents

Birth certificate + Social Security card	Location: _____
Marriage / Divorce records	Location: _____
Insurance policies	Location: _____
Auto Titles / Records	Location: _____
Bank / Investment statements	Location: _____
Credit cards	Location: _____
Pension/Union plan	Location: _____
Military records / DD-214	Location: _____
Funeral pre-arrangement + cemetery deed	Location: _____
Mortgage papers	Location: _____
Safe deposit box + key	Location: _____



Personal Information

Education

High school:	_____	Dates attended:	_____
College / trade:	_____	Dates attended:	_____
College / trade:	_____	Dates attended:	_____

Work & Life

Occupation:	_____				
Employer:	_____	Position:	_____	Years:	_____
Employer:	_____	Position:	_____	Years:	_____

Significant life accomplishments:

Unfinished work / unfinished conversations:

Personal Touches

Hobbies:	_____	Favorite place:	_____
Favorite music/song:	_____	Favorite reading/quote:	_____
Favorite color:	_____	Favorite flower:	_____
Fondest memory:	_____	Favorite movie:	_____

Recurring Bills & Subscriptions (keep/cancel)

Service / Bill:	Keep	Cancel
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>

Information for Newspaper / Announcement

Obituary Essentials

Spouse, widow, or widower of: _____

Date of death: _____ Place of death: _____

Organizations / Causes / Community Ties

Organizations/causes to mention: _____

In lieu of flowers — donation preference
(charity + notes/link): _____

Family Listing (as desired)

Children and their residences:

Grandchildren and their residences:

Brothers and their residences:

Sisters and their residences:

Service Announcement Notes

Out-of-town guidance: _____

Preferred wording style (traditional / memorial /
celebration of life / simple): _____

Family Roles

Obituary writer: _____ Photo/slideshow
coordinator: _____

Funeral Service Preferences

Basic Information

Religious / personal beliefs to be expressed _____

Faith / affiliation _____

Name and address of church / venue / gathering place _____

Service type (check all that apply):

Traditional funeral (casket present)

Celebration of Life

Private family only

Memorial service (no casket present)

Graveside service

Direct cremation + later gathering

Celebration of Life (Optional)

Tone / vibe (simple, casual, formal, theme): _____

Dress code (theme) (optional): _____

Program notes (speakers, open mic, memory table): _____

Slideshow / photos (who has files): _____

Reception / gathering location: _____

Funeral Home / Calling Hours

Funeral home / provider name/address _____

Funeral home / provider phone number _____

Funeral Director _____

Casket / urn _____

Flowers OR donations (in lieu of flowers, charity name/link, etc.) _____

Calling hours / visitation _____

Music / playlist _____

Cemetery Instructions

Name of cemetery/location _____

Deed/plot location _____

Burial

Cremation

Mausoleum

Other

Memorial tablet _____

Type _____

Inscription _____

Financial Details

Financial provisions arranged in advance _____

Family guidance on budget _____

Policy # _____ Plan _____

Initial death benefit _____ Issue date _____



Record of Personal Affairs

Key Contacts

Attorney: _____ Phone: _____

Address: _____

Executor/Admin: _____ Phone: _____

Address: _____

Accountant: _____ Phone: _____

Address: _____

Financial planner: _____ Phone: _____

Address: _____

Bank: _____ Phone: _____

Address: _____

Life insurance company: _____ Phone: _____

Address: _____

Physician: _____ Phone: _____

Address: _____

Employer / HR contact: _____ Phone: _____

Address: _____

Real Estate Broker: _____ Phone: _____

Address: _____

Keys / Access Map (Do not list codes)

Spare house keys location: _____	Who has copies: _____
Safe / lockbox location: _____	Where key is kept: _____
Safe deposit box location: _____	Where key is kept: _____

NOTES:

Digital Access & Passwords

Safety tip:

DO NOT write passwords on this page. Instead, write where they are stored (password manager, sealed envelope, home safe, attorney file) and who has access. If you use 2-factor authentication, note which device/app has it.

Password Manager & Recovery

Password manager used (if any) _____

Master password location _____ Recovery key / backup codes _____

Who can access it (name) _____ Who else knows location (name) _____

Primary Email & Phone (Used for Password Resets)

Primary email address _____ Cell phone number _____

Carrier (optional) _____

Two-Factor Authentication (2FA)

Methods used:

Text/SMS Authenticator Email Security Key

Authenticator app name _____ On which device (phone/tablet) _____

Backup codes location _____

Devices & Unlock Info

Device / Model	Unlock method	Apple ID / Google email

Key Online Accounts to Note

Banking Social Security

Credit cards Medical / health portal

Investments / retirement Utilities / phone / internet

Insurance portals Subscriptions (streaming, etc.)

Where Important Digital Files Are Stored

Cloud storage (Google Drive / iCloud / Dropbox) _____

Computer / external drive location _____

Home safe / binder / attorney file location _____

Family and Friends to Notify

Name _____ Relationship _____

Address _____ Phone _____

Name _____ Relationship _____

Address _____ Phone _____