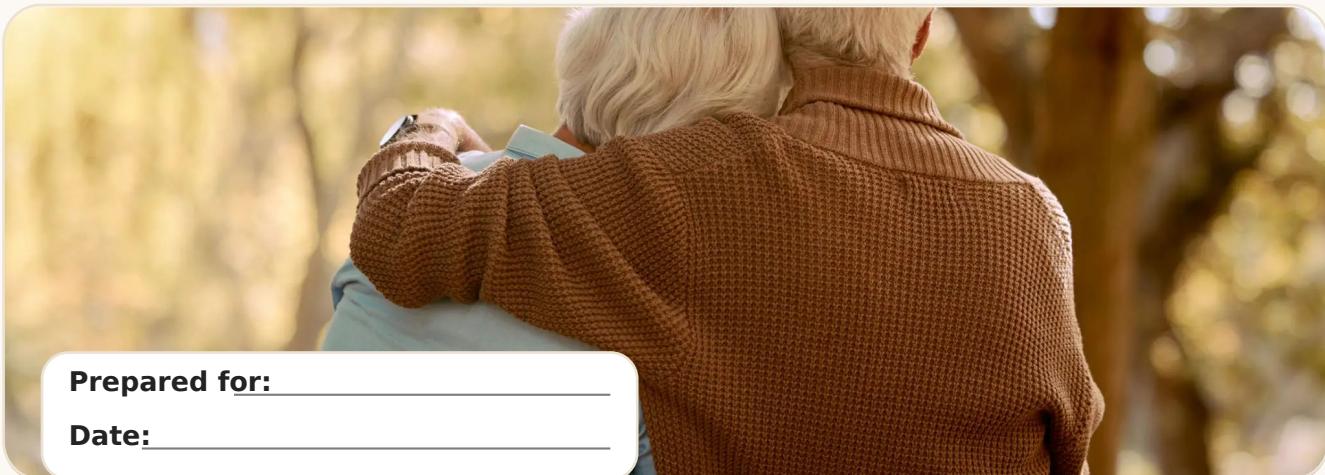


Planning Ahead Guidebook

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



Prepared for: _____

Date: _____

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

Name _____
 Address _____
 Social Security # _____ Citizenship _____
 Date of birth _____ Place of birth _____
 Marital status _____ Maiden name _____
 Name of spouse _____ Date deceased _____
 Wedding date _____
 Father's name _____ His place of birth _____
 Mother's name _____ Her place of birth _____
 Military service branch _____ Pension/VA claim # _____
 Induction date/place _____
 Serial # _____ Rank _____
 War(s) served _____ Decorations _____
 Discharge date/place _____

Important Documents Checklist

<input type="checkbox"/> Birth certificate	<input type="checkbox"/> Stocks and bonds
<input type="checkbox"/> Marriage certificate	<input type="checkbox"/> Pension/union plan
<input type="checkbox"/> Insurance policies	<input type="checkbox"/> Military records
<input type="checkbox"/> Last will and testament	<input type="checkbox"/> Auto records/papers
<input type="checkbox"/> Bank account numbers/passbooks	<input type="checkbox"/> Cemetery property deed
<input type="checkbox"/> Mortgage papers	<input type="checkbox"/> Credit cards/numbers
<input type="checkbox"/> Safety deposit box location	<input type="checkbox"/> Special message to my family
<input type="checkbox"/> Funeral pre-arrangement contract	<input type="checkbox"/> Other

It is best to gather all this information and keep it all together in a place that is easily accessible and its location is known by at least two family members.

Personal Information

Education _____

High school _____ Dates attended _____

College _____ Dates attended _____

College _____ Dates attended _____

Occupation _____

Employer _____

Position held _____ Years employed _____

Employer _____

Position held _____ Years employed _____

Organizations, clubs, and offices held _____

Significant life accomplishments _____

Unfinished work _____

Pets _____

Hobbies _____

Favorite things _____

Color _____ Flower _____

Song _____ Music _____

Poem _____ Book _____

Place _____ Other _____

Fondest memory _____

Information for Newspaper

Spouse, widow, or widower of _____

Date of death _____ Place of death _____

Children and their residences _____

Grandchildren and their residences _____

Brothers and their residences _____

Sisters and their residences _____

Funeral Service Preferences

Religious beliefs to be expressed _____

Religious affiliation _____

Name and address of church/synagogue/temple _____

Funeral home name/address _____

Funeral home phone number _____

Funeral Director _____ Place of service _____

Type of service _____ Clergyman _____

Special requests _____

Clothing (selected/purchased) _____

Jewelry (leave on/leave to family) _____

Glasses (on/off) _____ Hairstyle _____

Religious articles _____ Music _____

Casket _____ Visitation/calling hours _____

Flowers/donations _____

Cemetery Instructions

Name of cemetery/location _____

Deed/plot/location _____

Final disposition Burial Cremation Mausoleum Other

Memorial tablet _____ Type _____

Inscription _____

Financial Details

Financial provisions arranged in advance _____

Policy # _____ Plan _____

Initial death benefit _____ Issue date _____



Record of Personal Affairs

Attorney _____ Phone _____

Address _____

Accountant _____ Phone _____

Address _____

Executor/Administrator _____ Phone _____

Address _____

Stock Broker _____ Phone _____

Address _____

Bank _____ Phone _____

Address _____

Life Insurance Company _____ Phone _____

Address _____

Pension or Union Plan _____ Phone _____

Address _____

Real Estate Broker _____ Phone _____

Address _____

Physician _____ Phone _____

Address _____

Additional Information



Digital Access & Passwords

Safety tip (recommended):

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 location _____

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 App 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
- Credit cards
- Investments / retirement
- Insurance portals
- Social Security
- Medicare / health portal
- Utilities / phone / internet
- 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

Relatives and Friends to be Notified

Name _____ Relationship _____

Address _____ Phone _____

Name _____ Relationship _____

Address _____ Phone _____