

Section 9.

When Someone Dies

First Person

Do you have an organ donation form signed? Record details of arrangements and who to contact:

Funeral/Memorial Service Arrangements:

NOTE It is suggested that you read the narrative about this section prior to completing the data pages, to help in your decision-making process.

Arrangements for: _____
Mortuary name: _____
Address: _____
Telephone #: () _____ E-mail Address: _____
Representative contacted: _____
Prepaid funeral plan: _____

Which do you prefer:

- Direct Burial
- Direct Cremation
- Burial with funeral/memorial service
- Cremation with funeral/memorial service

Which do you prefer: Funeral Memorial Service

Indicate type of casket: _____

Indicate what clothing you wish to be dressed in: _____

Indicate choice of location of service: _____

Pastor/Rabbi _____

Telephone #: () _____

Special music choices: _____

Favorite Flowers: _____

Do you want a flower arrangement for the top of the casket ? _____

Special message/scripture readings: _____

Names(s) of those to participate in the service: _____

Obituary Information for Newspapers:

Date: _____

Name: _____

Date of birth: _____ Place of birth: _____

Most recent residence: _____

Education: _____

Career Background _____

Special recognition or achievements : _____

Military record: _____

Organizations, clubs, offices held: _____

Religion: _____

Politics, hobbies: _____

Survivors' names and cities where they live: _____

Memorial contributions, in addition to or in lieu of flowers, may be made to: _____

Newspapers, professional journals or alumni magazines to notify:

Special notes or additions: _____

Persons to Notify at Time of My Death:

NOTE This section is intended as a place to record names of people our families may not personally know. These may include extended family, colleagues and associates, or a contact person in each professional association, or place of worship, etc.

Name: _____ **Organization :** _____
Address: _____ **Telephone #:** () _____

_____ **E-mail Address:** _____
Note: _____

Name: _____ **Organization :** _____
Address: _____ **Telephone #:** () _____

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Note: _____

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Address: _____ **Telephone #:** () _____

E-mail Address: _____ **Organization :** _____
Telephone #: () _____

Note:

Name: _____
Address: _____

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Telephone #: () _____

Note:

Name: _____
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Note: _____

Distribution of Personal Property:

Distribution of your valuable property is always a difficult challenge. There is the financial value as well as the sentimental value to consider. At a time of grief and loss, the physical objects seem to form a link with those we miss.

This can be one of the major areas of discontent within families. To minimize potential conflict, early discussion with parties involved is encouraged.

NOTE The following "Letters of Instruction" are simply included to help facilitate this process and are not intended to become part of your legal documents **without the advice of your attorney.**

Is it suggested that you have your valuable possessions appraised every 5 to 10 years. List the items of value and discuss this list with your family to discern their desires. (You will be surprised at some of the less valuable, sentimental objects that mean a great deal to the children.)

After discussions and decisions are made, **CHECK WITH YOUR ATTORNEY** regarding signing and adding these to your estate planning documents.

Letter of Instruction:

I request that the Executor of my estate distribute the following items to the respective individuals:

- | | |
|-----------|-----------|
| 1) _____ | To: _____ |
| 2) _____ | To: _____ |
| 3) _____ | To: _____ |
| 4) _____ | To: _____ |
| 5) _____ | To: _____ |
| 6) _____ | To: _____ |
| 7) _____ | To: _____ |
| 8) _____ | To: _____ |
| 9) _____ | To: _____ |
| 10) _____ | To: _____ |
| 11) _____ | To: _____ |
| 12) _____ | To: _____ |
| 13) _____ | To: _____ |
| 14) _____ | To: _____ |
| 15) _____ | To: _____ |
| 16) _____ | To: _____ |
| 17) _____ | To: _____ |
| 18) _____ | To: _____ |
| 19) _____ | To: _____ |
| 20) _____ | To: _____ |
| 21) _____ | To: _____ |
| 22) _____ | To: _____ |
| 23) _____ | To: _____ |
| 24) _____ | To: _____ |
| 25) _____ | To: _____ |
| 26) _____ | To: _____ |
| 27) _____ | To: _____ |
| 28) _____ | To: _____ |
| 29) _____ | To: _____ |
| 30) _____ | To: _____ |
| 31) _____ | To: _____ |
| 32) _____ | To: _____ |
| 33) _____ | To: _____ |
| 34) _____ | To: _____ |

Signature: _____ **Date:** _____

Page: ____ **of** ____

LETTER TO FAMILY AND FRIENDS

This section is created to be a special place to put a letter to your family, with remembrances and things you would like to share with those you love.

To Do List When Someone Dies:

Determine who has authority to make the final arrangements!

1. Call next of kin, other family members, close friends and **employer**.
2. If appropriate, contact Pastor/Rabbi.
3. Call Mortuary to set up appointment.
4. Visit mortuary with at least one other person, to make arrangements. (Wishes are recorded in Exit Strategies. If family is coming from long distances, consider their needs in making plans. If the deceased was a veteran, take original discharge papers. Order **certified copies** of the death certificates.)
5. If burial or interment are chosen, call and visit the cemetery. (Do not go alone, again, take a trusted family member or friend with you. If you are uncomfortable or feel pressured, do not sign anything immediately, but discuss it away from the facility.)
6. Notify friends, neighbors and social groups.
7. **Concurrently with the above: Notify Attorney to review the following issues with him/her:**

Attorney name and Telephone #: () _____

- All legal and financial issues (wills, trusts, bank accounts, etc.)**
- Notify landlord – check to see how much notice will be necessary prior to vacating premises. Allow time to process loss and handle moving of belongings.
- Bank – obtain access to safety deposit box if one exists. Set up a proper estate administration bank account upon advice of the attorney.
- Contact Accountant.
- Contact Pension.
- Contact Social Security.
- Contact Life Insurance.
- Contact brokerage firms and investment companies.
- Cancel credit cards of deceased
- Insurance: Cancel insurance **upon sale of car**, and renters/home owners insurance **when space is officially vacated or sold**.
- Cancel group and publication memberships (check to see if any benefits are available prior to canceling).

Call a Professional Estate Organizer in your area for assistance.