

Documenting Your Wishes

By writing down your wishes, you give your survivors guidelines to follow during the difficult time of making final arrangements. Use the following questionnaire to put it all together and get your affairs in order.

Personal Data

My full name: _____ My spouse's full name: _____

My birth date: _____ My place of birth: _____

My father's full name: _____ My mother's full name: _____

The highest education level I have completed is: _____

My most recent employer is: _____ Telephone: _____

My mailing address is: _____

My residential address is: _____

Estate Information

I have asked _____ (executor/executrix) to settle my estate.

My will and other important papers are stored at _____

Any life insurance policies, pension statements and/or death benefit records I may have are stored at _____

I have given my power of attorney to _____ who can be reached at _____

Persons To Be Notified

The following people should be notified in case of my death.

1. _____
2. _____
3. _____
4. _____

Advisors To Be Notified

The following advisors should be notified in case of my death.

Attorney: _____

Banker: _____

Insurance Agent: _____

Minister: _____

Other: _____

Final Arrangement Wishes

I would prefer a _____ to be held at _____

I would like to be _____ at _____

I would like _____ to conduct the final ceremony. If this is not possible, I would like _____ to officiate.

I would prefer that individuals make donations to _____

rather than send flowers.

Thoughts and Personal Messages

Source: Adapted from *Getting Your Affairs in Order* (Penn State Extension)