

MEMORIAL PLANNING GUIDE

FOR THE FAMILY AND FRIENDS OF

Compliments of

PROSPERITY
LIFE GROUP®



MEMORIAL GUIDE

PERSONAL INFORMATION

Name _____
Social Security No. _____
Date of Birth _____
Place of Birth _____
Current Address _____
Marital Status _____
Name of Spouse _____
Maiden Name _____
If Veteran,
Serial No. _____
Branch of Service _____
Rank _____
Date Entered Service Month _____ Year _____
Date Discharged Month _____ Year _____

FAMILY INFORMATION

Father's Name _____
Father's Place of Birth _____
Mother's Name _____
Mother's Maiden Name _____
Mother's Place of Birth _____
Children's Names and Birth Dates

FUNERAL REQUESTS

Preferred Funeral Home _____
Service To Be Held ___ Church ___ Funeral Home
___ Other
If Church, Name _____
Favorite Hymns _____
Special Requests _____

Flowers _____
Contributions _____
Cemetery Name _____
Is Deed Available? ___ Yes ___ No
I Prefer: ___ Burial ___ Entombment ___ Cremation

KEY FAMILY MEMBERS TO CONTACT

Name _____
Phone No. _____
Name _____
Phone No. _____
Name Phone No. _____
Clergy _____
Requested Pallbearers

MEMORIAL GUIDE CONTINUED..

LEGAL AND FINANCIAL MATTERS

Executor of Estate _____
Phone _____
Attorney Name _____
Phone _____

Agent Name _____
Agent Phone _____

Safe Deposit Box _____
Life Insurance #1 _____
Company/Bank _____
Policy No. _____

Life Insurance #2 _____
Company/Bank _____
Policy No. _____

Life Insurance #3 _____
Company/Bank _____
Policy No. _____

Credit Cards _____
Company/Acct. No. _____
Company/Acct. No. _____
Company/Acct. No. _____
Company/Acct. No. _____
Company/Acct. No. _____

Checking Accounts _____
Institution/Acct. No. _____
Institution/Acct. No. _____

Savings Accounts _____
Institution/Acct. No. _____
Institution/Acct. No. _____

IRA or Investment Accounts _____
Institution/Acct. No. _____
Institution/Acct. No. _____

LOCATION OF IMPORTANT PAPERS

Will and Testament _____
Birth Certificate _____
Marriage Certificate _____
Stocks and Bonds _____
Certificate of Deposit _____
Military Records _____
Savings Passbooks _____
Automobile Papers _____
Trust Fund Information _____
Auto Insurance _____
Homeowners Insurance _____
Mortgage Papers _____
Property Deeds _____
Income Tax Papers _____

OTHER / COMMENTS



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