A guide to
Getting Affairs in Order

Helpful Questions to Ask

A valuable tool helping people protect their families and loved ones. Simple and easy to use, this workbook offers peace of mind by organizing paperwork and making wishes known.

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WHERE TO BEGIN

Whether you talk about it or not, death is going to happen. Accidents happen every day. Unexpected emergency health issues come up with no notice. With the help of A Guide to Getting Affairs in Order, you will record vital information that your family and loved ones need in the event of a calamity. This workbook is designed for everyone to use, and makes it easy for you to tell someone where your important documents are kept. It also allows you to clearly detail any final intentions and wishes.

Many decisions that need to be made at the time of death can be made in advance, such as burial arrangements, financial and legal matters. There is some solace for your loved ones knowing they are doing exactly what you wanted. This road map is provided by you for your survivors.

Even those who are superstitious and don't want to *talk* about death, or those that are not comfortable sharing financial information with anyone, now have a place to record everything they want their loved ones to know. The questions range from legal documents and financial affairs, to family history and more delicate matters such as your last wishes. Everyone needs someone who knows what to do or who to call.

This guide will help you, your family and loved ones have peace of mind.

Where to begin? This workbook is designed to be a step by step guide, and clearly identifies all documents and information necessary to make final arrangements. Read through the workbook first, and then begin to write in the answers wherever you choose. If circumstances change, or financial information needs updating, it is quick and easy to add new account statements and remove and shred those that are no longer active. This workbook can be stored with the current year's tax information, and then easily reviewed each year.

Be sure to tell someone where to find this workbook!

There are many sad stories about people passing unexpectedly and not one person in the family knows what that person's wishes were. You have this opportunity to record your intentions and ensure that those who are helping to sort through your affairs know what you want. They will know the location of your will and any additional paperwork. They will know if there are accounts other than the obvious checking and savings accounts, and what to do with the funds in those accounts. There is no need to have them hunt and search everywhere for important documents.   It can be quite costly when research and legal services are required to settle a person's estate. This workbook will ensure that attorney's and counselors are not being paid by your estate to do this research and make these decisions.

So begin now. Fill in what you can, and the book will guide you through the rest.

LEGAL DOCUMENTS

Is there a Will? ___

Date of Will? ___

Where is it kept? ___

Who has copies? ___

Who is the Executor or Personal Representative? ___

Is there a Living Trust? ___

Date of Trust? ___

Where is it kept? ___

Who has copies? ___

Who is the Successor Trustee? ___

Name/address/phone of Attorney: ___

___

Wills and Trusts are just tools in the larger process of estate planning. And estate planning, simply put, means having the legal paperwork to dispose of property, upon death, in a way that recognizes the wishes and needs of the parents and survivors. These tools minimize confusion, plan for disability and address other potential challenges.

This workbook does not provide legal advice, and no one should rely on it in making any final legal decisions without consulting a lawyer. It is designed to provide a starting place for conversation, organization, and decision-making regarding what is right for your family.

IMPORTANT DOCUMENTS

Where are these important documents kept?
(if any of these are kept in a safe deposit box, there is a space on page 12 for that detail)

Power of Attorney: ______________________________

Durable Power of Attorney: ______________________________

Advance Health Care Directive: ______________________________

Birth Certificates: ______________________________

Adoption Certificates: ______________________________

Marriage License: ______________________________

Divorce Decrees: ______________________________

Military Records & Discharge papers: ______________________________

Passports: ______________________________

Death Certificates: ______________________________

Social Security Card: ______________________________

Property Deeds: ______________________________

Tax Records: ______________________________

FINANCIAL INFORMATION

This section is where you list important financial information:

List Banks, Credit Unions, Savings & Loan Companies:

Who is listed on each account?
Who is listed at the bank as the beneficiary on each account?

Suggestion: Put a statement or a copy of each statement in a file or an envelope so you have all information and phone numbers, and just list the institutions here with the above info. It is helpful to put corresponding # on the statement to match the listing here (1, 2, 3 etc).

LAST WISHES

So now that you are getting all the financial information organized, let's continue on to the questions that are a bit more difficult. And first time around, you may not have all the answers. You may need time to think about these issues, so these questions may have to be visited again.

Is there to be a burial? __________

Where? __________

What kind of casket? __________

What will be on the marker? __________

There are many choices for services such as; a private or public viewing, private family service, memorial service, funeral with casket present, graveside service only, just to mention some of the options.

Is cremation preferred? __________

Are the ashes to be scattered or buried? __________

Where? __________

Is there a religious affiliation? __________

Is there a preferred clergy to be involved? __________

Some people have arrangements made and paid for, and if that is your case, then you will need to list that information here:

Name and phone number of Company: __________

Where is that file kept? __________