

*A Guide to*  
**GETTING AFFAIRS  
IN ORDER**

Protect your family and loved ones  
Quick and easy to complete  
Where you keep your important documents  
Offers peace of mind

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A Guide to Getting Affairs in Order  
Individual Version

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## WHERE TO BEGIN

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 a bit of 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 who 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 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information needs updating, it is quick and easy to add new account statements and remove and shred those that are no longer active.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.

The three most important documents are 1) a Will or a Trust, 2) Advance Health Care Directive, and 3) **Durable** Power of Attorney.

Write N/A, or none, next to anything listed that you do not have so someone isn't looking needlessly for something that doesn't exist.

### **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 attorneys 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.

## WILLS AND TRUSTS

Most people have a Will or a Trust, but some families have both.

Is there a Will?

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Date of Will:

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Where it is kept:

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Who has copies:

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Name and phone of the Executor or Personal Representative:

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Is there a Living Trust?

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Date of Trust:

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Where it is kept:

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Who has copies:

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Name and phone of the Successor Trustee:

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Name/address/phone of Attorney:

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Wills and Trusts are just tools in the larger process of estate planning. Estate planning, simply put, means having the legal paperwork to dispose of property, upon death, in a way that recognizes the wishes of the deceased and the needs of the 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 11 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 Cards: \_\_\_\_\_

Property Deeds: \_\_\_\_\_

Tax Records: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## LAST WISHES

It's important to let your loved ones know what you want, particularly if you have a preference for burial or cremation. The details don't have to be decided right now, but write in as much as you can.

Is there to be a burial?

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Where?

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What kind of casket?

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What will be on the marker?

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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.

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Is cremation preferred?

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Are the ashes to be scattered or buried?

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Where?

---

Is there a religious affiliation?

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Is there a preferred clergy to be involved?

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Some people have arrangements made and paid for. If that pertains to you, then you will need to list that information here:

Name and phone number of Company:

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Where is that file kept?

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