

# My Final Wishes

## Quick Planner

One rule for the whole page. Write down where things are kept. Never write down the secret itself. No passwords, no PINs, no account numbers, no Social Security numbers. This page is meant to be found, and anything you would not want a stranger reading does not belong on it.

### PART 1: WHO GETS CALLED FIRST

The first hours are phone calls. List the people your family should reach and the order you would want them reached in. Include anyone who would be hurt to hear it secondhand.

|    |                  |  |
|----|------------------|--|
| 1. | Name             |  |
|    | How they know me |  |
|    | Phone            |  |
| 2. | Name             |  |
|    | How they know me |  |
|    | Phone            |  |
| 3. | Name             |  |
|    | How they know me |  |
|    | Phone            |  |
| 4. | Name             |  |
|    | How they know me |  |
|    | Phone            |  |

Anyone who should be told privately, not on a group call or online:

## PART 2: BURIAL OR CREMATION

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This is the first decision your family will be asked to make, often within a day, and it is the one people most often have no idea how to answer.

- ☐ Burial
- ☐ Cremation
- ☐ Donation to a medical or research program
- ☐ I would rather my family decide

If you have already made arrangements somewhere, write down where. Prepaid or preplanned arrangements are easy to lose track of.

Funeral home or cemetery, if arrangements already exist

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Plot, niche, or property already owned

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If cremation, what you would want done with the ashes:

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## PART 3: THE SERVICE

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There is no wrong answer here, including no service at all.

- ☐ A full service
- ☐ A graveside service only
- ☐ A memorial or celebration of life, later, when people can travel
- ☐ Something small, family only
- ☐ Nothing formal

Religious or faith tradition to follow, if any

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Place of worship, clergy, or celebrant to contact

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People I would want to speak

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Music, readings, or anything specific I would want included:

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Anything I would specifically not want:

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#### PART 4: WHAT I WOULD WANT SAID

Most families are handed a blank page and asked to write an obituary in an afternoon. A few lines from you saves them hours and gets it right.

The things I would want mentioned (work, service, faith, hobbies, the people I was proudest of):

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If people want to do something, I would rather they:

☐ Send flowers

Give to a specific charity

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Do something else

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#### PART 5: WHERE THINGS ARE KEPT

Locations only. Not the contents, and not any number that would let someone get in.

Will, trust, or estate documents

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Life insurance policy documents

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Deed, title, or lease

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Vehicle titles

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Military discharge papers (DD-214)

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Birth certificate, marriage certificate

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Safe deposit box, and who is on it

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Home safe, and who knows how to open it

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Tax returns

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Attorney, accountant, or financial professional to contact:

Name

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Phone

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Insurance agent or agency to contact:

Name

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Phone

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If you own life insurance, the single most useful thing you can do is make sure the person you named knows it exists. That is a short exercise on its own, and it is the one families most often miss. For guidance on how to track down a policy, see [How to Find a Lost Life Insurance Policy](#).

## PART 6: THE PRACTICAL THINGS PEOPLE FORGET

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These are small, and they are what actually falls apart in the first week.

Pets. Who takes them, and what they need

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☐ Plants, livestock, or anything else that needs feeding

Employer or former employer to notify

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☐ Automatic payments coming out of my accounts

☐ Subscriptions and memberships that will keep billing

☐ Phone, email, and social media accounts, and whether I want them closed or left up

☐ Anyone I owe money to, or who owes me

☐ A key, a spare key, or an alarm code someone will need (tell a person, do not write it here)

## PART 7: WHO HAS A COPY

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A planner nobody can find is not a plan.

☐ I have told at least one person this page exists

☐ They know where it is kept

A second person also knows

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☐ The person named in my will or trust has been told

I have written today's date on it

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