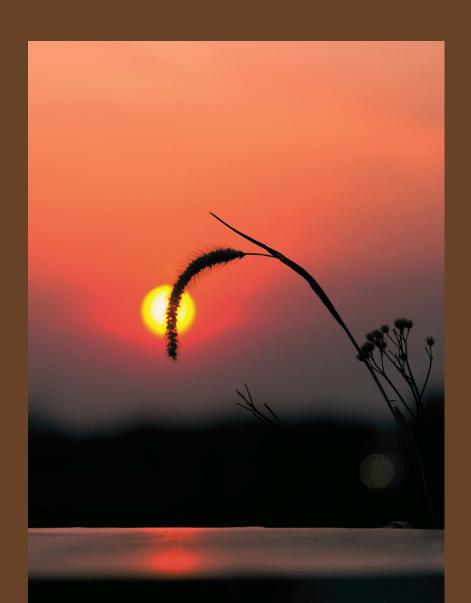


FORTHED Planning Guide

01	About Me
02	Family Tree
03	First Things First
04	Memorial Arrangements
05	Financial Records & Important Documents
07	Additional Information

Table Of OMTENTS





About ME

Full Name:

Date of Birth: Place of Birth:

Social Security Number:

Marital Status at Death:

Spouse Name: Date of Marriage/Death:

Mother's Name:

Mother's Birthplace:

Father's Name:

Father's Birthplace:

Education:

Career:

Military:

Date & Place of Induction:

Date & Place of Discharge:

For the funeral home, you will need the above information.

Other Details I'd Like in My Obituary:

Your life was a blessing, your memory a treasure.

FAMILY

Siblings & Their Spouses:

Children & Their Spouses:

Grandchildren:

Grandparents:

Aunts, Uncles, Cousins:

Stepfamily Members:

First THINGS FIRST

Home

Mail is received at:

Check mail every few days as forms needed may be delivered here.

Pets

Names:

Name & Address of Person/Place to take Pets:

Schedule for Feeding/Type of Food/Treats:

Veterinarian:



Employment

Person to Contact & Contact Number:

Others to Notify

Person(s) to Contact & Contact Number:

These can notify the rest of the friends in our circles.

Those who touch our lives stay in our hearts forever.



Memorial ARRANGEMENTS

Funeral Home

Name & Contact Number:

Request multiple copies of death certificate. Do not give the original unless mandated..

Celebration of Life/Funeral

Church/Location & Person to Contact:



Someone should stay at the home for security 8 in case of deliveries during the service. Specifics for the ceremony are attached.



For My Body

Cremation Details:

Burial Details:

Obituary

Newspaper/How to Publish:

What I would like published is attached.

Financial RECORDS & Important DOCUMENTS

Tax Preparer

Person to Contact & Contact Number:



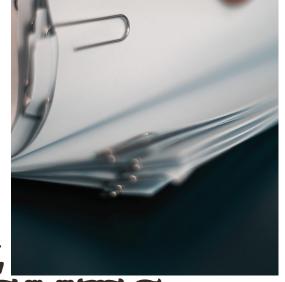
Safe Will/Trust Papers Location: Combination: Location: **Financial Advisor Attorney** Person to Contact & Contact Number: Person to Contact & Contact Number: **Bank Accounts Account Documents** Name & Location: Location: Usernames & Passwords Location: Usernames & Passwords Location: Credit Cards Safe Deposit Box Card Names: Location: Autopay List (before cancel cards) Location: Key Location:

Medical

Physician & Contact Number:

Pharmacy & Contact Number:

Financial RECORDS & Important DOCUMENTS



House Vehicle Title Locations: Mortgage Company: Account Documents Location: Car Registrations are in each vehicle. Insurance Agent & Contact Number: Drivers License Location: Policies Location: Subscriptions/Services Life Insurance A list of subscriptions and services to cancel is attached. They will need to be cancelled so the estate Agent & Contact Number: will not be liable. Policies Location: Cell Phone Contact the agent or company noted on the policy. Each company will have specifics regarding the Cell Phone Provider: processing of death benefits. Pass Code to Phone: Birth Certificate Location: Social Media

Email

Addresses & Passwords:

Accounts, Usernames & Passwords:

Additional INFORMATION



Suggested Topics to Consider:

- Do you want your online presence to continue or be deleted?
- Is there income from investments, annuities, or trusts that needs to be addressed?
- Do any accounts need titles changed?
- Any specific items or heirlooms to be given to specific people that are not addressed in the will/trust?
- Additional items that need to be addressed?
- Items not addressed above but are important to know?





let's get in touch



www.danikamaher.com myagentisdanika@gmail.com @myagentisdanika



Fortified
Health & Wealth

CELEBRATION of Life

My Wishes for My Celebration of Life

	Photo(s) for use is located:
] 	Songs to be Played:
3	Colors/Specific Item for Attendees to Wear:
3	Minister/Person to Perform Service:
3	Pall Bearers:
K	Speakers & Roles:
3	
7	
	Cremation Details
	Urn Chosen:
7	Jewelry to made from cremains:
	Burial Details
	Casket Chosen:
	Open/Closed:
	Want to Wear:
	Clothes/Jewelry/Artifacts to Bury With:
	Cemetery:
	What to Write on Tombstone/Burial Plate:

What has been paid for/Remaining balance:

Flowers/In Lieu of Donation:



Include in Obituary:

Photo for release is located:

Edit if any specifics have changed.