



## 4. Estate & Financial Information (optional)

Do you have a will? Yes  No  Living Will: Yes  No  Trust: Yes  No

Location \_\_\_\_\_

Attorney or Power of Attorney \_\_\_\_\_ Phone \_\_\_\_\_

Name and Location of Your Bank \_\_\_\_\_

Safe Deposit Box: Yes  No

Location of Birth Certificate \_\_\_\_\_

Location of Marriage License \_\_\_\_\_

Health Insurance Company \_\_\_\_\_ Policy Number \_\_\_\_\_

Life Insurance Company \_\_\_\_\_ Policy Number \_\_\_\_\_

Location of Military Records (DD214) \_\_\_\_\_

Location of Other Records, Deeds, Titles, etc. \_\_\_\_\_

## Final Thoughts

We hope you have found this planning guide helpful. By completing it, your services will be more thoughtful because loved ones will not have to make particularly difficult decisions at an intensely painful time. They will be more memorable because you will have chosen favorite songs and guiding thoughts—in some cases from childhood—of which your loved ones may not be aware. They may be less expensive because there is usually less emotional spending when preferences are expressed in advance. And—if you have filed a copy with us where it is immediately available—your services will be less stressful because family members can spend time supporting one another rather than searching for key documents.

We have these hopes for you:

First, we know from working with families over the years that the most difficult part of preplanning is getting started. We hope, therefore, this planning guide will make getting started easier.

Second, we know the best way to complete an unpleasant task is to do it quickly. We encourage you to set a time frame—two weeks, two months, whatever you want—and pledge it to yourself to have it done by then.

Third, we hope you find this to be a pleasant rather than unpleasant task. We hope you find wonderful old memories of loved ones and friends in old records and photos, and that those memories from yesterday will enrich your life today.

Finally, if we can provide information on the following or other items, we hope you will let us be of service.

- How to estimate Social Security or Veterans benefits.
- How prepaid funeral costs may receive favorable treatment for Medicaid qualification.

**SWEET HOME**  
FUNERAL CHAPEL

1443 Long Street • Sweet Home, OR  
(541) 367-2891

[SweetHomeFuneral.com](http://SweetHomeFuneral.com)