



WEALTH
— COMPANIONS —



My Final Wishes



A fillable planning guide
for the people you love

Use this document to record important information, final wishes, contacts, document locations, and family instructions. This guide is not a will, trust, or legal document. It is a practical companion to help your loved ones know where to start.



Prepared For

Full legal name

Date

Phone

Email



Glenda Warren
Licensed Insurance Broker



*Protect your people.
Put the plan in writing.*

Basic Information

Record the details your family may need when handling paperwork, benefits, and final arrangements.

Tip: For sensitive numbers, you may choose to write only the last four digits here and keep the full document in a secure location.

Legal name

Date of birth

Phone number

Last four digits of SSN

Parent or guardian names

Attorney or advisor name

Home address

Maiden or previous name

Place of birth

Email address

Occupation

Primary beneficiary

Attorney or advisor phone

Emergency Planning Contact

Primary contact name

Relationship

Alternate contact name

Primary contact phone

Primary contact email

Alternate contact phone

Location of Important Documents

Help your loved ones find the documents, keys, policies, and accounts they may need.

Will or trust location

Life insurance policy paperwork location

Annuity or retirement account paperwork location

Birth, marriage, divorce, military, and tax documents location

Home deed, mortgage, or lease documents location

Vehicle titles, registrations, and auto insurance location

Keys, safe combinations, or access instructions

Bank statements and account information location

Computer, phone, email, and password manager instructions

Do not write full passwords here unless this document will be stored securely. A safer option is to identify where passwords are stored and who has permission to access them.

Insurance and Financial Information

This page helps your family know whom to contact and where to look for protection benefits.

Life Insurance Policies

Policy 1

Carrier/company policy 1

Agent/broker contact policy 1

Beneficiary notes policy 1

Policy number policy 1

Approximate death benefit policy 1

Where paperwork is located policy 1

Policy 2

Carrier/company policy 2

Agent/broker contact policy 2

Beneficiary notes policy 2

Policy number policy 2

Approximate death benefit policy 2

Where paperwork is located policy 2

Policy 3

Carrier/company policy 3

Agent/broker contact policy 3

Beneficiary notes policy 3

Policy number policy 3

Approximate death benefit policy 3

Where paperwork is located policy 3

Financial Professionals and Accounts

Bank or credit union contact

Financial advisor contact

Retirement account custodian

Tax professional contact

End of Life Plans

Share your preferences for funeral, memorial, burial, cremation, and service arrangements.

I would like to have a:

- Funeral Memorial Celebration of Life Other

I would like to be:

- Buried Cremated No preference Other

I have selected an urn or casket:

- Yes No Not applicable

I have pre-purchased a burial plot:

- Yes No Unsure

Burial, cemetery, or cremation location

Where I would like my service held

Requested officiant or clergy name

Funeral home preference

Specific ceremony requests or cultural traditions

Ceremony preferences:

- No service Open casket Closed casket
 Wake Graveside ceremony No preference

Personal Touches and Military Honors

Use this page to record meaningful songs, flowers, readings, prayers, and personal requests.

Favorite songs

Favorite flowers

Requested readings, prayers, scriptures, poems, or speakers

Items I would like to be buried or memorialized with

Names of requested pallbearers or honorary pallbearers

Military honors requested:

Yes

No

Not applicable

Military branch, rank, service dates, or veteran benefit notes

I have attached personal notes to loved ones:

Yes

No

Consider attaching personal letters, favorite photos, a playlist, or instructions for family traditions you want honored.

Obituary Information

These details can help your loved ones write an obituary that sounds like you, not a template from a Tuesday afternoon.

Preferred full name for obituary

Education and schools attended

Career titles, businesses, or professional service

Awards, honors, memberships, ministries, or organizations

Hobbies, passions, favorite sayings, and things people should remember

Family members I would like mentioned

Anything I do not want included

Important Contacts and Care Instructions

List the people who should be contacted and any care instructions for pets or dependents.

People to Contact		
Name	Relationship	Phone / Email
Contact 1		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact 2		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact 3		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact 4		
<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact 5		
<input type="text"/>	<input type="text"/>	<input type="text"/>

Pet or Dependent Care

Pet names and veterinarian information

Who should care for my pets or dependents

Care instructions, food, medication, routines, or important notes

Final Notes, Signatures, and Next Steps

Use this final page to leave instructions, reminders, or a message your loved ones may need later.

Additional final wishes or notes to loved ones

Important: This guide is for planning and communication only. It is not a substitute for a will, trust, beneficiary designation, medical directive, power of attorney, or legal advice. Review legal, tax, and estate planning decisions with qualified professionals.

Confirmation

Signature

Date

Witness or trusted contact name

Date reviewed or updated



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Licensed Insurance Broker

Wealth Companions helps families protect income, prepare for legacy conversations, and put practical plans in place before life forces the conversation.
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