MY SIMPLE
RETIREMENT



My Final Wishes

A planning guide for the people I love

THIS BOOK BELONGS TO

Date started

Last reviewed

How to use this book

- Keep the finished planner somewhere your family can find it without a key.
- Tell at least one person where it is, and which insurance companies to call.
- Look it over once a year, when your yearly policy statements come, or after a big change like a move, marriage or death in the family.
- This planner is a record of your wishes, not a legal document. A will is still the place for legal decisions.

Keep it safe: write *where* things are kept, never policy numbers, account numbers, your Social Security number or passwords. A paper book in a drawer is no place for them.

A LETTER

To the people I love

I have filled in this book so that, when the time comes, you will not have to guess.

Inside are my wishes for my service and my resting place, the people to call, my life insurance policies and where to find the papers you will need. I have also written down some of the memories and words I hope you will keep.

Please take these pages in the spirit they are given: with love, and with the hope that they make a hard time a little easier.

Signature _____ Date _____

Witness _____ Date _____

A Note to My Family

A few words to go with your wishes. Many people write why they made these plans and what they hope for their family.



PART 1

Arrangements

Everything the funeral home and the person making arrangements will need: who I am, who to call, and how I would like to be laid to rest.

1 About Me

The funeral home and the death certificate will need these details.

Full legal name

Date of birth

Place of birth (city, state)

Father's full name

Mother's full name (including maiden name)

Marital status

Spouse's name

Date of marriage

Place of marriage (city, state)

If my spouse has died: the date, and where

Occupation, and when I retired

2 My Family

Names only. The funeral home and whoever writes the obituary will want the whole family, with every name spelled right.

My children, and their husbands or wives

My grandchildren

My brothers and sisters

My parents-in-law

3 Who to Call First

The people who will handle things. Include a phone number for each.

First person to call _____

Executor of my will _____

Funeral home _____

Clergy or person to lead the service _____

Person who will make the final arrangements _____

Lawyer _____

Accountant or tax preparer _____

Life insurance agent _____

4 My Service Wishes

Write as much or as little as you like. Your family will be grateful for any guidance.

I would like

☐ Earth burial ☐ Cremation ☐ Mausoleum or entombment ☐ Other

☐ Leave it to my family

My service should be

☐ Public ☐ Private: family and friends ☐ Private: family only

☐ No service

Visitation or viewing

☐ Yes ☐ No

Casket

☐ Open ☐ Closed ☐ No preference

Glasses

☐ On ☐ Off

Where the service should be held

Music, hymns or songs

Readings, scripture or poems

Clothing and jewelry

Pallbearers

Flowers, or donations instead to

Organizations to take part (church, lodge, club)

Anything else about the service

5 My Final Resting Place

Cemetery name and location

My plot, crypt or niche is already bought ☐ Yes ☐ No

Where the papers for it are

Headstone or marker, and what it should say

If cremated, what should happen to my ashes

6 Paying for My Funeral

Knowing the money is there, and where to find it, lets your family say yes to your wishes without worry.

How it will be paid

☐ Life insurance policy ☐ Savings ☐ Prepaid funeral plan ☐ Other

If other, how

Where the papers are (policy, bank or funeral home contract)

Anything else my family should know about paying

“Planning ahead is one more way of taking care of the people you love.”





PART 2

Remembrances

A life deserves to be remembered in its own words. These pages help with the obituary and the eulogy, and become a keepsake for the family.

7 For My Obituary

Family members often forget details at a hard time. A few notes here make writing it easier.

My name as it should appear

Newspapers or websites to publish it

Family to list (the names are on the My Family page; add anyone else here)

Schooling, work and service

Church, clubs and organizations

Things I am proud of

Photo to use, and where it is

8 How I Want to Be Remembered

This page becomes a keepsake. Some families have a grandchild interview their grandparent to fill it in.

One of my fondest memories

Accomplishments I am proud of

The people and places that shaped me

Beliefs I would like shared at my service

What I would like my family to remember about me

My favorite song, scripture, flower or place

A final message to the people I love

9 My family tree

Write a name in each box, and a few words about each person: a memory, a habit, what made them who they were.

My grandparents

My grandparents

My grandparents

My grandparents

My mother

My father

Me

My spouse

My children

My children

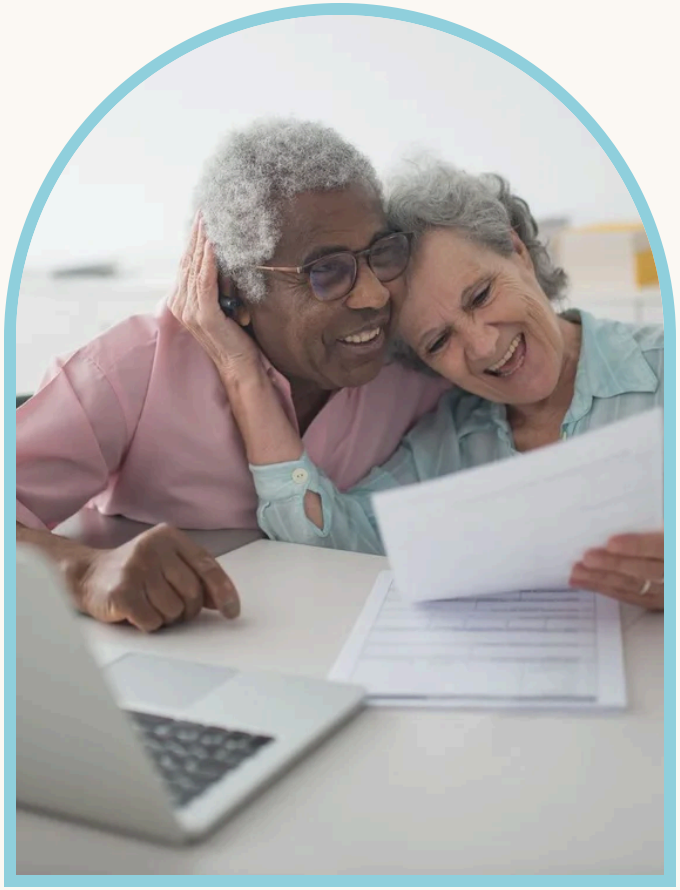
My children

My grandchildren

My grandchildren

My grandchildren

My grandchildren



PART 3

Practical Matters

Where to find my papers, my life insurance policies, the accounts to settle and the people to tell. Write where things are kept, never the numbers.

10 Where to Find My Important Papers

Write WHERE each one is kept, not the numbers. Never write passwords, policy or account numbers or your Social Security number in this planner.

My will _____

Trust papers _____

Prepaid funeral contract _____

Birth and marriage certificates _____

Social Security and Medicare cards _____

Passport _____

Citizenship or naturalization papers _____

Military discharge papers, if any _____

House deed and mortgage papers _____

Homeowners insurance policy _____

Car titles _____

Car insurance policy _____

Tax returns _____

Safe deposit box (bank, and who has a key) _____

Where my list of passwords is kept _____

Passwords: Don't write passwords in this booklet. Write only where your list is kept.

11 My Life Insurance Policies

Your beneficiary will need to know each policy exists to file a claim. List every policy: one you bought, one through work, one on a child or grandchild. Company names and places only.

Insurance company	Kind of policy	Who is named to receive it	Where the policy is kept

12 Where My Policy Papers Are Kept

The papers your family or your executor will ask for. Write WHERE each one is kept, never a policy number.

The policies themselves _____

The latest yearly statements _____

Letters from the insurance company _____

Beneficiary change papers _____

My agent, and how to reach them _____

Who else knows these policies exist _____

_____

Tell someone: A claim starts only when someone knows the policy exists. Tell your beneficiaries which companies to call, and keep this page up to date.

13 Accounts My Family Will Need to Close or Claim

Bank, retirement accounts, pension, credit cards, Social Security and utilities. List the company only; your executor will get the details.

Company or agency	Type of account	Notes

14 People to Tell

Friends and relatives who should hear the news personally.

Name	Relationship	Phone or email

Additional notes

FOR MY FAMILY

A few words on grief

Grief is the price of love, and there is no right way to carry it. Some days will be harder than others, and that is normal.

Lean on each other. Talk about me, tell the stories, and laugh when you can. If the weight does not lift, reach out to your doctor, your faith community or a grief counselor. Asking for help is a sign of strength.

Most of all, look after yourselves. That is what I would want.





MY SIMPLE RETIREMENT SOLUTIONS

A free planner from My Simple Retirement Solutions, a trade name of The CRM Center LLC.

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This planner is a record of your wishes, not a legal document. It does not change a will, a policy or who is named on it. Photos are of models.