

For My Loved Ones

At The Time of My Death

A workbook, guide, and conversation prompt to help families through life's most difficult, yet inevitable, moments.

Chicory Wealth

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INTRODUCTION

At Chicory Wealth, we understand that thinking and talking about the end of life can be difficult and uncomfortable. But we have also seen first-hand how critical such communication is to those who are left behind. Preparing ahead to make our loved ones' decisions easier at the time of our death is one of the best gifts we can give them.

This workbook offers an easy way for you to communicate this critical information in one place. Everyone's situation is different, so we suggest that you fill this out however works best for you. Feel free to add anything that is not specifically mentioned here that you think might be important. Just remember that the more details you provide, the easier it will be for your loved ones when you're no longer there. Many people wait too long to create a document such as this. It's never too early to do this. We encourage you to fill it out now and set a reminder to look at it and update it every year.

If you are a couple and wish to fill this out together because of shared accounts, etc., be sure to include personal preferences for each of you, where applicable.

When you have finished filling this out, have a conversation with those who need to know about it. Don't be afraid to talk about what you've written down. These conversations may be some of the best ones you will have with those you love. Be sure to keep this document safe and secure (such as in a firebox) and tell your loved ones where it's kept. It is not a legal document – it should not replace your will and other legal estate documents. It should also be updated regularly.

A SPECIAL NOTE TO CLIENTS OF CHICORY WEALTH

We want to make sure all our clients are aware that you have access to your own online vault through our Client Portal where electronic copies of your important documents, such as wills, trusts, health care directives, powers of attorney, etc., can be kept. You can keep a copy of this document there as well, although you will likely want to also keep a paper copy of it somewhere safe.

Be sure to let your loved ones know they can contact us at any time, should something happen to you. Please make sure we have a trusted contact form on file for them. We stand ready to help them with any financial complexities that might arise. We are here to support you and your family during all the critical moments of your life.

When the Time Comes

The first person my loved ones should call at the time of my death is this friend or family member *[include name and phone number]:*

These people should also be contacted (names and phone numbers):

Preferred funeral home *[if you have one]:*

The funeral home director should tell you how to get several copies of the death certificate.

Attorney to contact about the will:

My employer contact:

[If applicable] Here is how I would like my pets to be cared for:

Other notes:

Location of Important Documents

My list of important papers and where they are located *[such as Last Will and Testament, Social Security Card, Birth Certificate, Trust Documents, Tax Returns, etc.]:*

[If applicable] My Post Office Box and/or Safety Deposit Box information, including location, number, key location, contents, etc.:

Passwords & Online Accounts

Here is the master password for my password protection plan *[such as LastPass, Dashlane, Enpass, etc. - highly recommended]:*

[In the case of no password protection plan] Here is where you can find the location of my list of online accounts and log-in and password information:

Important Personal Information

Full name:

Address:

Phone Number:

Date and Place of Birth:

Social Security Number:

Primary Doctor:

Father's Name, Date and Place of Birth, and Date of Death *[if applicable]:*

Mother's Name, Date and Place of Birth, and Date of Death *[if applicable]:*

My Children's Names and Date and Place of Birth:

Other:

[In case of two people filling out this workbook]:

Full name:

Address:

Phone Number:

Date and Place of Birth:

Social Security Number:

Primary Doctor:

Father's Name, Date and Place of Birth, and Date of Death *[if applicable]:*

Mother's Name, Date and Place of Birth, and Date of Death [*if applicable]:*

My Children's Names and Date and Place of Birth:

Other:

Life Insurance & Other Benefits

Here is the list of all my life insurance policies and other benefit accounts, including the company names, policy numbers, benefit amounts, beneficiaries, phone numbers, location of documents, etc. This may include life insurance, pensions, Social Security benefits, veteran's benefits, etc. All these companies should be contacted about the date of death.

Other Insurances

Here is the list of my other insurances, including the company or agent, policy number, phone number and other important information:

Medical Insurance:

Auto Insurance:

Homeowner’s Insurance:

Other:

Personal Property & Outstanding Loans

Here is my list of important items of personal property. Where there is still a loan, I have indicated the lending company, policy number, phone number, amount owed at a certain date, and other important information:

Home and Other Real Estate:

Vehicles:

Cell Phone and Other Electronics:

Jewelry:

Other:

Distribution of Personal Property

If I have desires for how I would like my personal property to be distributed that are not outlined in my Last Will and Testament, they are described here:

Loans Owed to Me

[If applicable] Below is a list of loans that are still owed to me, including the name of the borrower, terms, location of documents, etc.

Banking & Payments Information

These establishments should be contacted about the date of death.

Banks. Here are the details about all my bank and/or money-market accounts including the name of the bank, phone number, names on the accounts, account numbers, type of account, and where documentation can be found.

Credit Cards. Here are the credit cards I hold, including the name of company, phone number, name on card, location of card, balance on the card at a particular date, etc.

Automatic Bill-Paying. Here is a list of bills I have set up to be paid automatically, including the name of the bank or credit card company from which the money is taken, account number, access information, the business being paid, amount and date of payment, etc. Unless these payments need to continue, these should be stopped immediately.

Interment & Memorial Preferences

Here I have listed any insurance policies or pre-arrangements for burial or funerals, including details and contact information:

My preferences for interment *[burial, cremation, green burial, particular cemetery or memorial garden, whether there should be a stone and what should be on it, where ashes should be scattered, etc.]:*

My preferences for a service *[location, music, readings, participants, etc.]:*

Charity preferences or any other desires:

Thoughts I Would Like to Share

Here I have left information I want to share with my loved ones. *[The statements below are meant as prompts, but any thoughts and messages will be appreciated by your loved ones, so feel free to skip these and write your own.]*

Where I spent most of my time as a child, and some memories I would like to share about where and how I grew up:

A description of my family when I was a child and teenager, along with some of my memories about them:

Some of the messages I received from my family growing up:

[If applicable] How I met my spouse or partner, and some of my favorite memories about them:

How I chose my career and my favorite part about it, and whether I would change anything about that career if I could:

[If applicable] What I remember about my children being born, and some of my favorite memories about them:

Here are a few of the most positive moments of my life and why they were meaningful:

Here are some of the times in my life that truly tested and challenged me. I've also described how I got through them and what these experiences taught me:

Three words that best describe who I tried to be in life and how I would like to be remembered:

Here is what I am most grateful for:

Other messages I would like to share:

[In case of two people filling out this workbook]:

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