



Final *Wishes*

A Planning Guide

*Taking care of what matters most today,
so your loved ones don't have to tomorrow.*

PREPARED WITH CARE BY

RyCo Life Solutions

www.rycolifesolutions.com

To My Family & Loved Ones,

Thinking ahead about these matters is one of the most loving things I can do for you. I've completed this guide so that — when the time comes — you'll have the answers you need without having to guess what I would have wanted.

Please use this as your roadmap. Everything important is here: who to call, what I've arranged, and where to find the documents you'll need. I love you.

PERSONAL INFORMATION

FULL LEGAL NAME

MAIDEN NAME (IF APPLICABLE)

DATE OF BIRTH

PLACE OF BIRTH

HOME ADDRESS

PHONE

SOCIAL SECURITY # (or location of card)

OCCUPATION / EMPLOYER

SPOUSE / SIGNIFICANT OTHER

FATHER'S FULL NAME MOTHER'S MAIDEN NAME

VETERAN STATUS / BRANCH / RANK (IF APPLICABLE)

LIFE INSURANCE POLICY INFORMATION

INSURANCE CARRIER

POLICY NUMBER

CARRIER CLAIMS PHONE

TYPE OF POLICY

PRIMARY BENEFICIARY

CONTINGENT BENEFICIARY



SERVICE PREFERENCES

I PREFER: Burial Cremation Entombment

SERVICE: Funeral Memorial Celebration of Life

CASKET: Open Closed No Preference

TYPE OF SERVICE *(religious, secular, military, etc.)*

PLACE OF WORSHIP / SERVICE LOCATION

OFFICIANT / CLERGY NAME & PHONE

PREFERRED FUNERAL HOME

FUNERAL HOME PHONE

PRE-PLANNED: Yes No

CEMETERY / FINAL RESTING PLACE

PLOT NUMBER / LOCATION

HEADSTONE / MARKER INSCRIPTION

PERSONAL TOUCHES

MUSIC OR SONGS TO BE PLAYED

READINGS, SCRIPTURE, POEMS OR PRAYERS

PREFERRED FLOWERS / FLORIST

WHAT I'D LIKE TO WEAR

PALLBEARERS

IN LIEU OF FLOWERS, DONATIONS TO

SPECIAL ITEMS TO INCLUDE WITH ME

PEOPLE TO NOTIFY

NAME & RELATIONSHIP

PHONE

EMAIL / ADDRESS

WHERE TO FIND IMPORTANT DOCUMENTS

Will or Trust _____

Bank & Financial Records _____

Birth & Marriage Certs _____

Safe Deposit Box & Keys _____

Military Discharge (DD-214) _____

Passwords / Safe Combo _____

Deed / Mortgage / Title _____

Tax Returns _____

KEY PEOPLE TO CONTACT

EXECUTOR / PERSON HANDLING AFFAIRS

ATTORNEY

FINANCIAL ADVISOR / CPA

WHO SHOULD CARE FOR MY PETS

A MESSAGE FROM MY HEART



YOUR LIFE INSURANCE PARTNER

RyCo Life Solutions

RYCO LIFE SOLUTIONS LLC

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👉 Keep this guide with your important documents and let a trusted loved one know where to find it. 👈