



Plan

for peace of mind



WORTHY
REMEMBRANCE

Vital Information *(for death certificate)*

Name _____

Social Security # _____

Date of Birth _____ Place of Birth _____

Current Address _____

Marital Status _____

Name of Spouse _____

Maiden Name _____

If Veteran, Serial # _____

Branch of Service _____

Rank _____

Date Entered Service _____ Date Discharged _____

Union / Fraternal Organizations _____

Family Information

Father's Name _____

Mother's Name _____

Mother's Maiden Name _____

Children's Names _____

Funeral Requests

I Prefer: Burial Entombment Cremation

Preferred Funeral Home _____

Cemetery Name _____

Director _____

Service to be Held

Place of Worship Funeral Home Other

If Place of Worship, Name _____

Presider _____

Requested Pallbearers _____

Favorite Hymns _____

Flowers _____

Contributions _____

Special Requests _____

Key Family Members to Contact

Name _____ Email _____

Phone # _____ Mobile # _____

Name _____ Email _____

Phone # _____ Mobile # _____

Name _____ Email _____

Phone # _____ Mobile # _____

List All Insurance Policies: life, health, home, auto

Policy # _____ Company _____ Type _____

Policy # _____ Company _____ Type _____

Policy # _____ Company _____ Type _____

Credit Cards

Company _____ Account # _____

Company _____ Account # _____

Company _____ Account # _____

Checking Accounts

Company _____ Account # _____

Company _____ Account # _____

Savings Accounts

Company _____ Account # _____

Company _____ Account # _____

IRA or Investment Accounts

Company _____ Account # _____

Company _____ Account # _____

Company _____ Account # _____

Legal and Financial Matters

Executor of Estate _____

Attorney _____

Location of Important Papers

Safe Deposit Box _____

Will and Testament _____

Birth Certificate _____

Marriage Certificate _____

Stocks and Bonds _____

Certificates of Deposit _____

Military Records _____

Savings Passbooks _____

Automobile Papers _____

Insurance Policies _____

Mortgage/Property Deeds _____

Tax Information _____

Where to Keep Important Papers

Some people place important papers in a safe deposit box. However, this is not necessarily a good idea.

State laws generally require safety deposit boxes to be sealed when someone dies. As a result, beneficiaries may not have access to necessary information.


Home is Best

Storing important papers at your home in a fire-safe file is fine. Leaving this guide for your beneficiaries will allow you to reach out to your loved ones and help them deal thoughtfully with the final inevitable reality of life.

Premier Insurance Contracts, Inc.

Since 2005, Premier Insurance Contracts has been diligently working to ensure that you stay protected and free from financial problems.

Our company is there for you, as we make sure that we use and follow safe and conservative financial practices to help you achieve total financial governance in your life.




*W*e have seen the difficulty loved ones go through far too frequently when making final arrangements for those who depart before us.

As a very important contribution to you and your loved ones, Premier Insurance Contracts has prepared this personal planning guide to help you determine important guidelines and information that will help your family manage your final affairs following your wishes.

The true and ordered transcription of your personal and financial interests will render an invaluable meaning when your family circle is broken.

We strongly recommend that you keep this personal planning guide in a place that your loved ones can easily access, and make sure they know about its existence and location.



To My Loved Ones:

I want to express my desire that you are relieved from anxiety, expenditure, and worry at the time of my passing.

In this personal planning guide, I have registered important information about my wishes and a list of important documents and their locations.

I want to make sure that you provide this information to the proper individuals so that everything goes smoothly and according to my wishes.

I truly desire that you find all these arrangements comforting and that they will help you retain a worthy remembrance of all those wonderful and marvelous years we have shared.

Signature _____

Date of Completion _____

Updated _____



Premier Insurance Contracts, Inc.
16750 Hedgcroft Dr. STE 500 | (832) 850-6873
www.prinsuco.com