

Final Wishes Planner

Write down what you want, while it is easy to write down.
Your family should not have to guess at the worst possible moment.

Planner owner

Last updated

Important security note

Do not write passwords in this planner. Record which accounts exist and use a trusted password manager for passwords. Tell one trusted person how to reach it.
This planner is an organizational resource and is not a legal document.

legacyreadyfamily.com

Build and update your planner online - free to start

1. Funeral and burial preferences

Burial or cremation preference

Preferred cemetery, burial place, or ashes location

Religious service, faith, or congregation

Open or closed casket preference

People you would like to speak

Music, readings, or other details

2. People to contact

Family and close friends

Employer or business contacts

Clergy / faith community

Other people who should be notified

3. Life insurance

Insurance company or companies

Policy number(s)

Where the physical or digital policy is kept

Agent or contact information

4. Financial accounts

Banks and credit unions

Retirement accounts

Brokerage / investment accounts

Where account records are kept

5. Bills and recurring payments

Mortgage or rent

Utilities

Insurance premiums

Subscriptions and recurring services

Which account pays each bill

6. Property and documents

Deeds and property records

Vehicle titles

Safe deposit box and key location

Birth / marriage certificates

Other important documents

7. Digital accounts

Password warning

Do not write passwords here. List account names only and use a password manager.

Email accounts

Phone / mobile account

Social media accounts

Cloud photo / file storage

What should happen to these accounts

8. Dependents and pets

Who should care for dependents or pets

Medical / school / care details

Veterinarian and pet care information

Daily routines and other instructions

9. Personal messages

Letters, recordings, or messages to pass on

Where those messages are stored

Other personal instructions

Annual review checklist

Look at this planner once a year and whenever a major life change happens.
Tell at least two trusted people where to find the current copy.

- ☐ Funeral preferences still reflect my wishes
- ☐ Contact list is current
- ☐ Insurance information is current
- ☐ Financial institutions are current
- ☐ Bills and recurring payments are current
- ☐ Property and document locations are current
- ☐ Digital account instructions are current
- ☐ Dependent and pet instructions are current
- ☐ Trusted people know where this planner is kept

Review date

Notes