

Personal Data & Information Regarding End-of-Life Planning. Whatever information you choose to share will be kept confidential on file at church.

Your Name _____ Date of Completion _____

9. Personal Information Needed by Survivors

Location of my will and trusts

Location of securities, life insurance, etc., and/or name, address, phone no. of broker.

Location of deed, mortgage agreement, lease, car title, etc.

Location of papers concerning arrangements for organ donations

Estimated number of copies of death certificate needed to process my estate (copies required for Social Security, VA, each insurance company, each bank account, every stock and/or bond house, and other properties).

Names of persons who have been given copies of sections of these forms (financial POA, health care, executors, funeral directors, parish church, family/friends).

Name _____ Phone _____

Name _____ Phone _____

Name _____ Phone _____

Name _____ Phone _____

Other information that may be helpful to my survivors.
