



# My Wishes Record Keeper

A guide for your loved ones to fulfill your final wishes.



**ENCORE FINANCIAL GROUP**  
*Your goals, our mission.*

## Introduction

We created the *My Wishes Record Keeper* booklet, along with the *Peace of Mind Checklist*, to be a simple tool for organizing your wishes and important information from your life. We encourage you to share this with your close family members. This may be one of the easiest, but most valuable gifts you can provide your loved ones.

## To My Family

I know this will be difficult time for you. Upon my death, you will be asked to make numerous decisions and attend to countless details. My intent is to help ease the burden that has fallen on your shoulders. So I have attempted to provide you with the information you will need to put my affairs in order and to let you know my final wishes.

I thank you with all of my heart for your love and willingness to carry out these final tasks in my behalf.

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Signature

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Date

Printed Name

## About me

This is information the funeral home may need to create my obituary.

Full Name (including maiden name): \_\_\_\_\_

Address: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Birthplace (city, state) \_\_\_\_\_

Spouse's Full Name: \_\_\_\_\_

Religious Affiliation: \_\_\_\_\_

Employment Information: \_\_\_\_\_

Clubs & Organizations: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Education: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Other Biographical Information: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Military Record:**

*Branch of Service:* \_\_\_\_\_

*Serial Number:* \_\_\_\_\_

*Rank:* \_\_\_\_\_

*Dates of Service:* \_\_\_\_\_

**Surviving Relatives:**

*Name:*

*Relationship:*

*Residence:*

<i>Name:</i>	<i>Relationship:</i>	<i>Residence:</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
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_____	_____	_____
_____	_____	_____

Date Amended:

# Important People

These are the relatives, friends, and acquaintances I would like you to notify.

*Name:*

*Relationship:*

*Phone:*

_____	_____	_____
_____	_____	_____
_____	_____	_____
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## Important Papers

Here is where you will find the important papers and documents you may need to settle my affairs.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

### Safety Deposit Box:

*Location:* \_\_\_\_\_ *Box Number:* \_\_\_\_\_

*Location of Key(s):* \_\_\_\_\_

### Locations of:

*Will:* \_\_\_\_\_

*Trust:* \_\_\_\_\_

*Social Security card:* \_\_\_\_\_

*Military Records:* \_\_\_\_\_

*Insurance Policies:* \_\_\_\_\_

*Pension & Retirement Plan Documents:* \_\_\_\_\_

*Income Tax Documents:* \_\_\_\_\_

*Stocks & Bonds:* \_\_\_\_\_

*Property Deeds or Mortgage Documents:* \_\_\_\_\_

*Rental and/or Lease Agreements*

*Automobile Titles:* \_\_\_\_\_

# Important Papers- continued

*Birth Certificate:* \_\_\_\_\_

*Marriage Certificate:* \_\_\_\_\_

*Electronic passwords:* \_\_\_\_\_

*Other:* \_\_\_\_\_

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# My Key Advisors

These are the people I relied on and whom you can count on for help and guidance.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

*Name:*

*Phone:*

*Attorney:* \_\_\_\_\_

\_\_\_\_\_

*Power of Attorney:* \_\_\_\_\_

\_\_\_\_\_

*Executor of Estate:* \_\_\_\_\_

\_\_\_\_\_

*Accountant:* \_\_\_\_\_

\_\_\_\_\_

*Financial Advisor:* \_\_\_\_\_

\_\_\_\_\_

*Insurance Agent:* \_\_\_\_\_

\_\_\_\_\_

*Physician:* \_\_\_\_\_

\_\_\_\_\_

*Other:* \_\_\_\_\_

\_\_\_\_\_

*Other:* \_\_\_\_\_

\_\_\_\_\_

*Other:* \_\_\_\_\_

\_\_\_\_\_



## My Finances

These are the places where I have financial dealings.

See *Peace of Mind Checklist* attached (check if you filled out the checklist)

<i>Financial Institution</i>	<i>Account Number</i>
<i>Checking Account:</i> _____	_____
<i>Checking Account:</i> _____	_____
<i>Savings Account:</i> _____	_____
<i>Savings Account:</i> _____	_____
<i>Investment Account:</i> _____	_____
<i>Investment Account:</i> _____	_____
<i>Loan:</i> _____	_____
<i>Loan:</i> _____	_____
<i>Credit Card:</i> _____	_____
<i>Credit Card:</i> _____	_____
<i>Other:</i> _____	_____
<i>Other:</i> _____	_____

# My Memorial Service

Here are my wishes for my memorial service and final resting place.

Funeral Home: \_\_\_\_\_ Pre-arrangements: \_\_\_Yes \_\_\_No

Type of Service: \_\_\_\_\_

Desired Location: \_\_\_\_\_

Clergyman or Officiant: \_\_\_\_\_ Phone: \_\_\_\_\_

Pallbearers: \_\_\_\_\_

## Special Requests

Clothing: \_\_\_\_\_

Viewing: \_\_\_\_\_

Eulogy: \_\_\_\_\_

Music: \_\_\_\_\_

Prayers or Readings: \_\_\_\_\_

Flowers: \_\_\_\_\_

Donations: \_\_\_\_\_

Preferred Cemetery or Mausoleum: \_\_\_\_\_

Plot Purchased: \_\_\_Yes \_\_\_No Location: \_\_\_\_\_

Headstone or Monument: \_\_\_\_\_

Inscription: \_\_\_\_\_

## My Memorial Service- continued

*Special Requests or Instructions:* \_\_\_\_\_

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## One Last Wish

This is what I would like my family and friends to remember about me.

*My Early Life:* \_\_\_\_\_

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*My Hopes & Dreams:* \_\_\_\_\_

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*My Career:* \_\_\_\_\_

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*My Hobbies & Interests:* \_\_\_\_\_

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## One Last Wish- continued

*My Travels:* \_\_\_\_\_

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*My Favorite Places:* \_\_\_\_\_

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*My Greatest Accomplishment:* \_\_\_\_\_

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*My Fondest Memories:* \_\_\_\_\_

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Date Amended:



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Florida • Michigan • Pennsylvania

For assistance or additional information  
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