



# Final Wishes

Planning Guide





This booklet belongs to:

***A message to funeral participants:***

I'm the counselor who assisted in preparing this plan. Please know that I'm available to help in any way I can.

Name

Telephone number

Email

Signature

## Your voice

Someday, this Final Wishes Planning Guide will speak for you. Preparing the booklet now is a thoughtful gesture your family and friends will appreciate.

The questions are simple and easy to follow. If you need assistance in completing this booklet, just ask your TruStage™ Preplanning Solutions Representative for guidance.

The result will be a clear record of your final wishes, a source of important documents for legal and public records and a permanent keepsake of your fondest memories to speak to future generations.

Please store this completed booklet in a safe but public place in your home. Everyone in your family should know exactly where to find it quickly and easily without a key or the distress of a search.

Your current efforts will lighten your loved ones' responsibilities and ensure that your funeral wishes are honoured.





**To my loved ones:**

I wanted to spare you as much anxiety, grief and expense as possible at the time of my death, so I've suggested some arrangements in advance through this booklet. I hope they relieve some pressure at this difficult time.

This booklet is divided into two parts. The first section includes vital statistics, funeral service guidelines and cemetery requests — all important to the funeral director while planning the details of my service.

The second section is more personal and provides material for eulogies, obituaries and other remembrances. There are additional information pages at the end of the booklet.

Please accept these arrangements in the spirit they are given: with love, hoping to soothe your hurt and help you remember the best times we shared.

Signature  Date

Witness  Date



## Section one: Information for the funeral director

Completing this section thoroughly will provide your funeral director with all the information necessary to assist your family in making final arrangements as easy and meaningful as possible.

More specifically, the section will help your funeral director identify the people responsible for making funeral arrangements, file necessary papers, guide your family's claims for survivors' benefits and arrange the details of your funeral with clarity on key matters.



### First person to be notified upon my death

Name   
Street address   
City  Prov  Postal code

Telephone number   
Relationship   
Email

**Executor**  Same as above  Other

Name   
Street address   
City  Prov  Postal code   
Telephone number   
Email

**The most important memory is the one you'd like to leave on the hearts and minds of your loved ones.**



**Friends and relatives to be notified**

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

**Friends and relatives to be notified (cont.)**

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email

Name   
Relationship   
Street address   
City  Prov  Postal code   
Telephone number   
Email







Friends and relatives to be notified (cont.)

Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>

Friends and relatives to be notified (cont.)

Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>
Name	<input type="text"/>
Relationship	<input type="text"/>
Street address	<input type="text"/>
City	<input type="text"/>
Prov	<input type="text"/>
Postal code	<input type="text"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>



**Vital statistics about me**

**Current home address**

\_\_\_\_\_

City \_\_\_\_\_ Prov./Country \_\_\_\_\_

**My birthdate**

\_\_\_\_\_

Birthplace

City \_\_\_\_\_ Prov./Country \_\_\_\_\_

Father's name

\_\_\_\_\_

Birthplace

City \_\_\_\_\_ Prov./Country \_\_\_\_\_

Mother's name

\_\_\_\_\_ Maiden name \_\_\_\_\_

Birthplace

City \_\_\_\_\_ Prov./Country \_\_\_\_\_

**Marital status**

Married  Single  Divorced  Widowed  Other

Spouse's name

\_\_\_\_\_

**Education**

Grade completed

\_\_\_\_\_

Degree(s)

\_\_\_\_\_

**Occupation**

\_\_\_\_\_

Employer

\_\_\_\_\_

Type of occupation

\_\_\_\_\_

Date retired (if applicable)

\_\_\_\_\_

**Next of kin/Relationship**

\_\_\_\_\_

Phone and/or address

\_\_\_\_\_

Email

\_\_\_\_\_

**Secondary next of kin**

\_\_\_\_\_

Phone and/or address

\_\_\_\_\_

Email

\_\_\_\_\_

**Tertiary next of kin**

\_\_\_\_\_

Phone and/or address

\_\_\_\_\_

Email

\_\_\_\_\_

**Military service**

Branch of service

\_\_\_\_\_

Service serial number

\_\_\_\_\_

Date enlisted

\_\_\_\_\_

Place enlisted

\_\_\_\_\_

Type of separation or discharge

\_\_\_\_\_

Place of separation

\_\_\_\_\_ Date \_\_\_\_\_

Location of discharge papers

\_\_\_\_\_

Highest grade/rank/rating

\_\_\_\_\_

War(s)/conflict(s) served

\_\_\_\_\_

Medals/honours/citations

\_\_\_\_\_

\_\_\_\_\_

Additional military information

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Additional personal information**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_



### My preferences for the service

Burial of body       Cremation

Person completing arrangements

Telephone number

Preferred funeral home/director

Place of service

Type of service

Clergy or celebrant

Eulogist/tributes

Visitation  Family only       Family and friends

Special requests  Donations in lieu of flowers to

Other (please specify)

Lodge, society or fraternal organization(s)

Music

Glasses  Remove       Leave on

Jewelry  Leave to family       Leave on

Clothing  Purchased       Selected

Pallbearers/honourary pallbearers  Phone

Phone

Phone

Phone

Phone

Phone

Preferred casket

Preferred urn

### Cemetery instructions

These are my wishes regarding the final disposition of my remains.

Final disposition

Earth burial

Inurnment

Columbarium niche

Scatter (please specify desired location)

Retain by family

Other (please specify)

Name of cemetery

Location

Cemetery property owned?

Yes     No

Monument/marker

Inscription

Additional information



## Section two: Personal remembrances

A funeral should honour the life lived. And, because your life is unique, its memorial should evoke your distinctive qualities.

This section will help participants in your funeral focus on how you wish to be remembered. Afterward, it will be a treasured keepsake of your life. You may wish to use a video or audio recorder to tape your responses, and perhaps have a family member interview you.

**Information for the obituary**

Suggested newspapers

Include photo  Yes  No

Place of birth  Date

Spouse

Education  Yes  No

Married

Wedding Date and Place of Marriage

Widow/widower of  Yes  No  
 If yes, place of death  Date

	Name	Place of residence
Children	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Grandchildren	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
Siblings	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

**Information for the obituary (cont.)**

Religious affiliation

Clubs and lodges

War(s)/conflict(s) served

Employment





**Personal remembrances and life review  
Information for the eulogy**

I would like the following religious beliefs expressed at my funeral	
Some significant accomplishments in my life	
One of my fondest memories	
One of the greatest inspirations in my life	
If I could live my life over again, I would:	

**Information for the eulogy (cont.)**

Occupations	
Employers	
Business associates	
Hobbies	
Favorite places	
Religious affiliation	
House of worship	
Address	
Member since	
Religious activities and offices held	
Organizations (service clubs, lodges, fraternities, sororities, etc.)	
Organization activities	



### Information for the eulogy (cont.)

Favorite poem or scripture

--

Favorite song or music

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Favorite flower

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Favorite colour

--

My unfinished work

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My pets

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More of my favorite things

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I want my family to remember me for:

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### A final message for my family and friends

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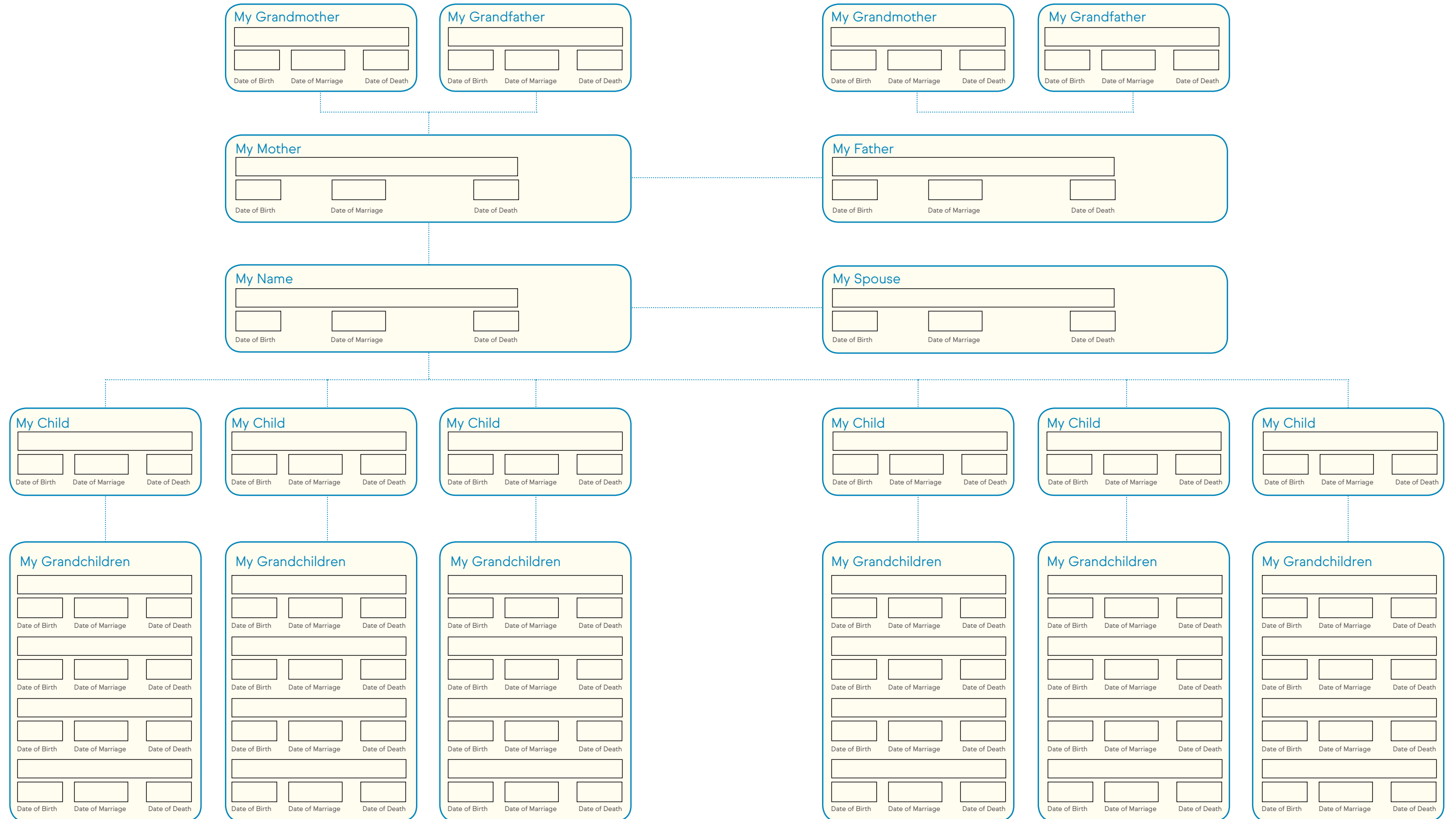
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**Plan confidently so you  
can focus on your future.  
And theirs.**



# My family tree





**A goal without a plan is just a wish.**

**Important people, papers and accounts**

We all accumulate important papers. Some have sentimental value, such as graduation certificates, letters from loved ones and commendations from fellow workers or employers. Others have financial value, such as stocks and bonds, wills, savings account passbooks, deeds, veterans records and insurance policies.

To help make sure everything is in order, here are the places where I've stored everything.

Birth and marriage certificates	<input type="text"/> <input type="text"/>
Will and testament	<input type="text"/> <input type="text"/>
Social Insurance Number and location of physical card	<input type="text"/> <input type="text"/>
Insurance policies	Company name <input type="text"/> Policy number <input type="text"/> Company name <input type="text"/> Policy number <input type="text"/> Company name <input type="text"/> Policy number <input type="text"/>

**Important people, papers and accounts (cont'd)**

Military records	<input type="text"/> <input type="text"/> <input type="text"/>
Description of homestead property owned Location	<input type="text"/> <input type="text"/>
Mortgage holder name	<input type="text"/> <input type="text"/>
Description of secondary property owned Location	<input type="text"/> <input type="text"/>
Mortgage holder name	<input type="text"/> <input type="text"/>
Information on benefits available from any retirement plan may be obtained from	Company name <input type="text"/> Address <input type="text"/> Prov <input type="text"/> Postal code <input type="text"/> Telephone <input type="text"/> Email <input type="text"/> Web address <input type="text"/> Username <input type="text"/> Password <input type="text"/>
Stock and bond certificates Name and location	<input type="text"/> <input type="text"/> <input type="text"/>
Safe deposit box	<input type="text"/> <input type="text"/>

**Important people, papers and accounts (cont'd)**

Financial Planner Name   
Address   
City  Prov  Postal code   
Telephone   
Email

Savings account(s) Establishment name   
Account No.   
Username  Password   
Establishment name   
Account No.   
Username  Password

Bank account(s) Establishment name   
Account No.   
Username  Password   
Establishment name   
Account No.   
Username  Password

Credit card(s) Type  Number   
Web address   
Username  Password   
Type  Number   
Web address   
Username  Password   
Type  Number   
Web address   
Username  Password

**Important people, papers and accounts (cont'd)**

Lawyer Name   
Address   
City  Prov  Postal code   
Telephone   
Email

Primary doctor Name   
Address   
City  Prov  Postal code   
Telephone   
Email

Specialist Name   
Address   
City  Prov  Postal code   
Telephone   
Email

Social media Site   
Username  Password   
Site   
Username  Password   
Site   
Username  Password   
Site   
Username  Password   
Site   
Username  Password





## To the survivors:

### A few thoughts on how to manage bereavement

As natural as death is, modern culture has made it hard for those affected to grieve in ways that feel the most natural. We often tend to bottle our sadness inside. This only makes the process more difficult and less complete.

It's important to feel like you can share your feelings of loss with others. A funeral ceremony is an important first step, but the weeks and months that follow are crucial, too. We encourage you to seek out family, friends, clergy or a professional therapist, even if you feel you're coping well. This can be particularly important for children.

TruStage™ is committed to providing you with the outstanding customer service you deserve and answers to all of your questions and concerns when needed.

For more information regarding this guide, please contact your local representative, or contact our customer service center:

#### **TruStage™**

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TruStage is the market leader in prefunded funeral insurance in the U.S. and Canada. For over 80 years, our companies have helped bring peace of mind. Our products help funeral firms manage risk, process payments and provide more support for the people and families they serve.

**For more information**

agent name

agent number

Insurance products are underwritten by TruStage Life of Canada.