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## From the Heart Journal

This journal was created for the benefit of my family and loved ones. I have taken the time to outline all aspects of my financial information because it is important to me to leave a legacy of love.



# 1) Care of Dependent Children

In the event that my spouse and I both die while our children are young, the following arrangements have been made on their behalf.

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Or, no arrangements have been made; however, my spouse and I hope the following arrangements could be made.

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## 2) Insurance Policies

We have the following insurance policies. You will need a copy of the death certificate to access benefits. You will want at least 10 copies of the death certificate.

### Life Insurance

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

## 2) Insurance Policies

We have the following insurance policies. You will need a copy of the death certificate to access benefits. You will want at least 10 copies of the death certificate.

### Annuities

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

Insurance company -----

Policy number -----

Owner -----

Face value -----

Beneficiary -----

### 3) Social Security Information

The Social Security Administration offers a variety of benefits. Call 800.772.1213 for help calculating the dollar amounts below and for complete details on benefits.

A lump sum burial benefits of \_\_\_\_\_ may be payable to my spouse and children.

A monthly benefit of \_\_\_\_\_ may be payable to my spouse and children.

My SSN \_\_\_\_\_

My Spouse SSN \_\_\_\_\_

My Children SSN \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

To receive benefits, you will need the following information:

- A certified copy of the death certificate
- Deceased's Social Security number
- Information on employer, approximate earnings for past two years, tax returns or W-2s
- Marriage certificate
- Social Security number and birth certificates for spouse and dependent children

## 4) Government Life Insurance

You will need a copy of my honorable discharge certificate. The location of this certificate is:

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If the discharge certificate cannot be found, a copy of it can be acquired by writing to the Department of Defense.

The Department of Defense  
National Personal Record Center  
1 Archives Drive  
St. Louis, Missouri 63138

Branch of service -----  
Dates of service -----  
Type of discharge -----  
Status of my coverage type -----  
Location of policy -----

## 5) Health Insurance

We have the following health insurance policies.

### Health Insurance

Insurance company -----

Policy number -----

Type of insurance -----

Insurance company -----

Policy number -----

Type of insurance -----

Insurance company -----

Policy number -----

Type of insurance -----

## 6) Location of Important Papers

Last will and testament	-----
Trust	-----
Durable power of attorney	-----
Limited partnership papers	-----
Promissory notes	-----
Credit cards	-----
Checkbooks	-----
Bank statements	-----
Other bank documents	-----
CD certificates	-----
Stock and bond certificates	-----
Annuities	-----
Mutual funds	-----
Other investments	-----
Retirement plans	-----
Tax records	-----
Mortgage records	-----
Other loan records	-----
Deeds to property	-----
Property tax bills	-----
Life insurance policies	-----
Property and casual policies	-----
Medical insurance policies	-----
Medical records/info	-----



## 7) Contacts

Last will and testament -----

Trust -----

Durable power of attorney -----

Limited partnership papers -----

Promissory notes -----

Credit cards -----

Checkbooks -----

Bank statements -----

Other bank documents -----

CD certificates -----

Stock and bond certificates -----

Annuities -----

Mutual funds -----

Other investments -----

Retirement plans -----

Tax records -----

Mortgage records -----

Other loan records -----

Deeds to property -----

Property tax bills -----

Life insurance policies -----

Property and casualty policies -----

Medical insurance policies -----

Medical records/info -----

## 7) Contacts

### Funeral Home

Name -----

Address -----

Phone number -----

Email address -----

### Banker

Name -----

Address -----

Phone number -----

Email address -----

### Real Estate Agent

Name -----

Address -----

Phone number -----

Email address -----

## 8) Real Estate Owned

Address -----

Mortgagor -----

Telephone number -----

Location of deed -----

Type (home, business, etc.) -----

Address -----

Mortgagor -----

Telephone number -----

Location of deed -----

Type (home, business, etc.) -----

Address -----

Mortgagor -----

Telephone number -----

Location of deed -----

Type (home, business, etc.) -----

Address -----

Mortgagor -----

Telephone number -----

Location of deed -----

Type (home, business, etc.) -----

## 9) Funeral and Burial

Body or organ donation -----  
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Preferred mortuary -----

City -----

State -----

Place of service -----

Church -----

Mortuary chapel -----

Person in charge of final arrangements -----

Relationship -----

Phone number -----

Description of services desired -----  
-----  
-----

Special readings or music -----

Person to conducted service -----

Internment request

Earth burial

Cremation

Mausoleum

Name of cemetery -----

City -----

State -----







## From the Heart Journal

This journal is presented to you because I understand the importance of helping my clients leave a legacy of love through the From the Heart Journal.