



Leaving Your House In Order



centerpoint
FELLOWSHIP

Centering Lives on Christ

My Confession of Faith

“For God so loved the world that He gave His only begotten Son, that whoever believes in Him should not perish but have everlasting life” - John 3:16

I, _____, confess my faith in Jesus Christ, the Son of the living God. I do hereby make it known to all my friends and family that I have accepted Jesus Christ as my Lord and Savior and that I am a Christian. Therefore, at my death, my friends and family can rest assured that I am in Heaven with my Lord and Savior.

In Christ,

Signature

Date

My Funeral Requests

Preferred Funeral Home: _____

Address: _____

Phone: _____ Contact Person: _____

I prefer to be buried at _____ cemetery.

I DO have a cemetery lot I do NOT have a cemetery lot

I am an organ donor. I request that my body/organs be donated, and my Donor Card authorizing this is attached.

I request that my body be cremated and direct the disposition of my remains as follows:

No ashes to remain

Disposition of ashes as follows: _____

Type of Funeral Service. I prefer my funeral service to be conducted at:

Church (name/location) _____

Funeral Home Chapel (name) _____

Graveside Service ONLY

Memorial Service at church or funeral home with private service at cemetery.

I prefer my casket to be Open Closed

I would like my service conducted by: _____

In lieu of flowers, I request that Memorial Gifts be designated for: _____

I would prefer the following people to be asked to serve as pall bearers:

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

I would prefer the following people to be designated as Honorary Pallbearers. _____

Personal Preferences

I would like the following statement read to those attending: _____

Other Requests: _____

Funeral Service Planning

Hymns or Christian Songs: _____

Special Music _____ Performed by: _____

Special Music _____ Performed by: _____

Scriptures to Read _____ Read by: _____

Scriptures to Read _____ Read by: _____

Poems or Stories _____ Read by: _____

Poems or Stories _____ Read by: _____

Special requests for Funeral Message: _____

Celebration of Life Information

What I want people to remember about me.

My favorite food is: _____

My favorite movie is: _____

My favorite song is: _____

My favorite book is: _____

The accomplishment I am most proud of in my life is: _____

My best vacation memory is: _____

My favorite childhood memory is: _____

The time I laughed the loudest was: _____

My favorite holiday memory is: _____

My favorite hobby is: _____

The thing I'm most passionate about is: _____

The experience that shaped me the most was: _____

I would describe my personality as: _____

What I love/admire most about each of my immediate family members: _____

My greatest accomplishments in High School were: _____

My greatest accomplishments in college/military were: _____

The dumbest thing I ever did was: _____

My career is: _____

My greatest career accomplishment is: _____

My greatest fear is: _____

My favorite pet was: _____

Friends that have meant the most to me are: _____

How I met my spouse and why I married him/her: _____

My favorite Bible verse is: _____

My favorite hymn/Christian song is: _____

How I came to meet Christ and the difference He made in my life: _____

The most significant spiritual experience in my life was: _____

My relationship with God is: _____

I believe the purpose for my life is: _____

If I could go back in time and change one thing it would be: _____

One thing I want said at my funeral: _____

One thing I don't want said at my funeral: _____

What I look forward to most about heaven is: _____

Obituary Data

(Deliver to Funeral Director)

Full Name _____ Nickname _____
 First Middle Maiden Last

Place of Birth _____ Date of Birth _____

Father's Full Name _____

Mother's Full Name _____

Children's (Spouse) and Grandchildren's Names and where they live: _____

Sibling's (Spouse) names and where they live _____

College(s)/University Attended: _____

Graduated: _____ Degree(s) Received: _____

Military Service: _____

Profession: _____

Achievements of worthy mention: _____

Church Membership _____

Membership in civic clubs, social clubs, alumni societies, etc. _____

Additional Information: _____

Who Should Be Notified of My Death

Name	Phone #	Relation

Copies of my obituary should be sent to the organizations listed below.

Name	Address	Phone

Contacts and Location of Important Documents

A complete record of my important papers is in the notebook which is kept (location) _____
_____. Although the notebook has all the details you
will need to know, here is a quick summary.

My Social Security Number is _____

My Drivers License Number is _____

The original copy of **My Living Will** is kept _____

The original copy of **My Will** is kept _____

At the time of my death, immediately contact the Executor of the will, who is _____
_____ (phone) _____. Also be sure to contact our
accountant, _____ (phone) _____, who does the tax returns.

Possibly because of insurance proceeds or other assets that will pass immediately to you at my
death, I recommend that you seek the advice from a competent **financial advisor**. To assist you in
financial matters, I recommend _____ (phone) _____.

Assuming there are **life insurance** policies, contact _____
(phone) _____, who should help you complete the claim form necessary
to receive the insurance proceeds.

Our **bank accounts** are with the following financial institutions. Contact the bank officer who
assists in matters dealing with banking and banking services. Our bank statements are kept
_____.

Bank _____ Location _____

Bank _____ Location _____

Bank _____ Location _____

Here are people who have done maintenance and repairs so you will know who to contact when a
need arises;

Car: Business Name _____

Contact Person _____ Phone _____

Heating / Air Conditioning: Business Name _____

Contact Person _____ Phone _____

Lawn Care: Business Name _____

Contact Person _____ Phone _____

Others:

Business Name _____

Contact Person _____ Phone _____

Business Name _____

Contact Person _____ Phone _____

Computer Passwords:

_____	_____
_____	_____
_____	_____

Here are some other things you should be familiar with and these are:

'Til Death Do Us Part

Although no one likes to consider the loss of a partner, every married woman needs to be prepared for the possibility of widowhood. According to the U.S. Census Bureau, one of every seven women in the United States over the age of 18 is a widow. Discussing what to expect and what will need to be done can be difficult. But doing so now can save some hardship and anxiety.

Assess Your Finances

1. Have a discussion with your partner about your finances each year. Identify assets and debts.
2. Determine what finances will be available if either of you dies.
3. Compute immediate cash needs, funds needed for children's education, living expenses and retirements needs.
4. Examine all investments carefully, including real estate and interests in any business. Consider to whom they might be sold.
5. Review and update your wills.

Update Financial Records

1. Gather financial statements, tax returns, loan documents, deeds, stock certificates, military records, birth and marriage certificates, and any divorce papers from prior marriages.
2. Make a list of each investment, debt and retirement plan indicating how the title is held, what document provides evidence of the investment, and where it is stored.
3. Obtain a copy of your own and your spouse's Social Security records by calling 1-800-772-1213 and asking for form 7004, *The Request for Earnings and Benefits Estimate Statement*.
4. Request and review a copy of your credit report from a national credit bureau such as TRW, Equifax or TransUnion. Report any inaccuracies. Note who is the primary cardholder. Make sure each of you has a card in your own name for which you are individually liable.

When Death Seems Near

1. Locate and review wills, trusts and other important papers.
2. Execute a durable power of attorney to take effect after you spouse dies.
3. Review all life insurance policies and retirement programs noting the designated beneficiary of each.
4. Remove important records such as wills, deeds and trust documents from safe-deposit boxes.

Quick Tip

Avoid making any major financial and life-changing decisions (such as selling your home) for at least a year after the death of your spouse. Your emotions may cloud your judgment of making the best decisions at that time.

After A Spouse Dies

- Order at least 10 copies of the death certificate from the funeral director. You will need to send one copy to each insurance company from which you intend to collect. You will also need a copy to apply to Social Security and veterans; benefits.
- Notify your bank, credit card companies (some may cancel the debt) and all insurance companies, including those handling life, homeowners and auto policies.
- Contact the attorney who will handle the probate if needed. The probate process authenticates your husband's will, pays any of his outstanding debts, files federal and state taxes on his estate and distributes assets to the proper heirs. If the will is relatively simple with few assets, debts and only one heir, namely you, it will probably not require probate.
- File the will with the probate court and open the probate process.
- Apply for a family allowance in probate court. Determine the amount by estimating your monthly living expenses.
- Open a bank account for your husband's estate.
- Review credit card agreements, Determine if you have credit life insurance coverage. Do not pay bills that are not your legal obligation.
- Notify all retirement plan administrators of your husband's death.
- Call the Veteran's Administration if your spouse was a veteran. Ask for VA pamphlet 27-82-2, *A Summary of Veteran's Administration Benefits*.
- File for any civil service death benefits that may be payable.
- Visit your local Social Security office and file for benefits. Remember to bring a certified copy of the death certificate.
- Contact unions, credit unions and fraternal organizations to which your husband belonged to find out about any death benefits.
- Change the title on any joint assets
- If your children are in college, ask them to visit the financial aid office. They may be eligible for increased aid.
- You still may file a joint income tax return noting the date of your spouse's death that year.
- Claim the \$5,000 death benefit exclusion on your income tax return.
- Revise your will.

