

LEGACY ORGANIZER

CONTACT THESE PEOPLE ON MY DEATH		
	Name	Phone number
Family members		
Trustee		
Executor		
Religious advisor		
Business associates		
Attorney		
CPA		
Financial advisor		
Insurance agent		
Social Security Administration		

PREFERENCES FOR MEMORIAL/FUNERAL		
Place		
Officiant		
Songs to include		
Readings to include		
Other preferences		
PERSONAL INFORMATION ABOUT ME		
	Name/Place	Date
Birth date/place		
Parents' names/birthdates		
Siblings names/birthdates		
Children's names/birthdates		
Schools attended		
Military service		
Jobs/careers		
Places lived		

Hobbies/interests	
Religious beliefs	
Favorite song, color, plant	
Favorite saying/motto	
Other	

PERSONAL MESSAGE TO MY LOVED ONES

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SEE DOCUMENT LOCATOR FOR LOCATION OF IMPORTANT DOCUMENTS/FILES