

# *It's About Time*



This booklet is your gift.  
From us to you; from you to your family.

## **Introduction**

**THIS BOOKLET OFFERS** a thoughtful and convenient way to begin the steps toward preplanning your services. The benefits are many...

- ... sparing your family the difficulty of making decisions at their time of grief
- ... ensuring that your wishes are known
- ... organizing important information
- ... protecting yourself and your family from rising costs
- ... adding your creativity and unique touch to your legacy.

There are four sections. Complete them in whatever order you please. Skip over parts that don't pertain to you. If you need more space, add comments in the margins or on the back.

Record your responses however you choose. Take your time. Reflect on your wonderful life. Consider your family. We'll help if you like.

Some people like to use colored pens. Some prefer to dictate their information to a trusted friend or family member who will fill in the blanks. Some complete it online. Some take photos of objects and tape them inside the pages. It is your book. So, get comfortable, get started, and begin celebrating your life.



**PLEASE NOTE: This booklet is not a legal document.** It is intended as a guide and may not include all information you may wish to communicate. We suggest that the completed booklet be placed in a secure location for safekeeping, and that your attorney or other trusted individual be apprised of where it is.

# First, The Facts

**MY FULL NAME IS** \_\_\_\_\_

**I WAS** born on \_\_\_\_\_ in \_\_\_\_\_

**MY FATHER'S** name is/was \_\_\_\_\_

**MY MOTHER'S** name is/was \_\_\_\_\_

**I WENT TO HIGH SCHOOL** at \_\_\_\_\_

in \_\_\_\_\_ and graduated in \_\_\_\_\_

**I WENT TO COLLEGE** at \_\_\_\_\_ and graduated in \_\_\_\_\_

with a degree in \_\_\_\_\_

**IN ADDITION,** I have a \_\_\_\_\_

degree/certification from \_\_\_\_\_

**I HAVE/HAD** \_\_\_\_\_ brothers and sisters.

*Their names are/were*

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**I MARRIED** \_\_\_\_\_

on \_\_\_\_\_ in \_\_\_\_\_

**WE HAD** \_\_\_\_\_ children.

*Their names are/were*

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**I HAVE** \_\_\_\_\_ grandchildren.

*Their names are*

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**I HAVE** \_\_\_\_ great-grandchildren.

*Their names are*

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**BELOW I AM LISTING** all nieces, nephews, cousins and other relatives.

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**MY MILITARY** service included

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**MY PROFESSION** is/was

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**THE JOB I MOST ENJOYED** was \_\_\_\_\_

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**I WORKED THERE FOR** \_\_\_\_\_ years

**I AM A MEMBER OF** church/synagogue

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In \_\_\_\_\_

**IN THE PAST I VOLUNTEERED FOR**

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**CURRENTLY**, I am active in these organizations

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**I WOULD LIKE MEMORIALS** to be made to

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**OTHER** \_\_\_\_\_

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# Second, Your Arrangements

**THE PICTURE** I would like used in my obituary is  
located in \_\_\_\_\_  
\_\_\_\_\_

**ONE UNUSUAL THING** that might be included is my  
obituary is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MY PREFERENCES REGARDING VIEWING** are  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WANT TO BE WEARING** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**OTHER INSTRUCTIONS** include \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WOULD PREFER** this type of service (i.e., funeral,  
mass, memorial service) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WOULD LIKE MY SERVICE** to be conducted at  
\_\_\_\_\_  
by \_\_\_\_\_

**MY WISHES** for the service are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WOULD LIKE** this person or these people to  
**OFFICIATE**  
\_\_\_\_\_  
\_\_\_\_\_

**I WOULD LIKE** these people to be **PALLBEARERS**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**THE HYMNS/MUSIC** I would most like to have are  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**THE NAME OF THE ORGANIST** or musician or song  
leader I would like to have is \_\_\_\_\_  
\_\_\_\_\_

**MY FAVORITE BIBLE VERSES** I would like to have read are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MY FAVORITE FLOWERS** are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WOULD MOST LIKE** to be remembered as \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**WHAT I WANT** my family to know is \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I want my final disposition arrangements to be (i.e., burial in a cemetery, interment in a mausoleum, cremation with burial, cremation with scattering) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**I WANT TO BE** buried/interred/scattered in this location \_\_\_\_\_  
\_\_\_\_\_

**I HAVE CEMETERY PROPERTY AT** \_\_\_\_\_  
\_\_\_\_\_

**AND THE DEED** is located \_\_\_\_\_  
\_\_\_\_\_

**I WOULD LIKE MY HEADSTONE**/marker to read \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**WHEN MY SERVICES ARE COMPLETE**, I hope my family and friends will \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**MY ARRANGEMENTS** have been preplanned and paid for at this funeral home \_\_\_\_\_  
\_\_\_\_\_

Other \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*"I felt like I was working with a compassionate family instead of a business. Charlie Dannel was amazing. He suggested bring some of my mom's paintings to the family night." - HB, Potttsboro*



# Third, The Logistics

## Your Important Papers

Some people store their important papers in a safe deposit box, some in a shoe box, some in a file box. Others have documents scattered hither and yon. We've included a list, but left plenty of room for you to add to it with whatever papers you consider important. "Where it is" refers to where papers can be located.



### HOUSE MORTGAGE OR DEED

Where it is \_\_\_\_\_

\_\_\_\_\_

Who the lender is \_\_\_\_\_

\_\_\_\_\_

### RENTAL PROPERTY INFORMATION

Where it is \_\_\_\_\_

\_\_\_\_\_

What it is \_\_\_\_\_

\_\_\_\_\_

### ADDITIONAL PROPERTY

Where it is \_\_\_\_\_

\_\_\_\_\_

What it is \_\_\_\_\_

\_\_\_\_\_

### CAR LOAN OR SALES CERTIFICATE

Where it is \_\_\_\_\_

\_\_\_\_\_

Who the lender is \_\_\_\_\_

\_\_\_\_\_

### CAR INSURANCE

Where it is \_\_\_\_\_

\_\_\_\_\_

Who holds it \_\_\_\_\_

\_\_\_\_\_

### MEDICARE/MEDICAID CARD

Where it is \_\_\_\_\_

\_\_\_\_\_

The number is \_\_\_\_\_

\_\_\_\_\_

### LIFE INSURANCE POLICY

Where it is \_\_\_\_\_

\_\_\_\_\_

Who holds it \_\_\_\_\_

\_\_\_\_\_

### HEALTH INSURANCE POLICY # 1

Where it is \_\_\_\_\_

\_\_\_\_\_

Who holds it \_\_\_\_\_

\_\_\_\_\_

**HEALTH INSURANCE POLICY #2**

Where it is \_\_\_\_\_  
\_\_\_\_\_

Who holds it \_\_\_\_\_  
\_\_\_\_\_

**HEALTH INSURANCE POLICY #3**

Where it is \_\_\_\_\_  
\_\_\_\_\_

Who holds it \_\_\_\_\_  
\_\_\_\_\_

**MEDICAL RECORDS**

Where they are \_\_\_\_\_  
\_\_\_\_\_

**POWER OF ATTORNEY**

Where it is \_\_\_\_\_  
Who it is \_\_\_\_\_

**MEDICAL POWER OF ATTORNEY**

Where it is \_\_\_\_\_  
\_\_\_\_\_  
Who it is \_\_\_\_\_  
\_\_\_\_\_

**LIVING WILL**

Where it is \_\_\_\_\_

**OTHER MEDICAL DIRECTIVES**

Where they are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**INVESTMENT/FINANCIAL CERTIFICATES**

Where they are \_\_\_\_\_  
\_\_\_\_\_

**CREDIT CARDS**

Where they are \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ATM CARDS**

Where they are \_\_\_\_\_  
\_\_\_\_\_

**TAX RECORDS**

Where they are \_\_\_\_\_

**LAST WILL AND TESTAMENT**

Where it is \_\_\_\_\_

**OTHER** \_\_\_\_\_

**LIST INTERNET ACCOUNTS** w/auto payments & passwords below

Company	Web address	Password

# Your Professional Representatives



**MY BANKER IS** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

*If you have more than one*

My banker is \_\_\_\_\_

\_\_\_\_\_

My banker is \_\_\_\_\_

\_\_\_\_\_

**MY PHYSICIAN IS** \_\_\_\_\_

\_\_\_\_\_

*If you have more than one*

My physician is \_\_\_\_\_

\_\_\_\_\_

My physician is \_\_\_\_\_

\_\_\_\_\_

**MY PASTOR/PRIEST/RABBI IS**

\_\_\_\_\_

\_\_\_\_\_

**MY FINANCIAL ADVISOR IS** \_\_\_\_\_

\_\_\_\_\_

**MY STOCKBROKER IS** \_\_\_\_\_

\_\_\_\_\_

**MY INSURANCE AGENT IS** \_\_\_\_\_

\_\_\_\_\_

*If you have more than one*

My insurance agent is \_\_\_\_\_

\_\_\_\_\_

My insurance agent is \_\_\_\_\_

\_\_\_\_\_

**MY LANDLORD IS** \_\_\_\_\_

\_\_\_\_\_

**MY REAL ESTATE AGENT IS** \_\_\_\_\_

\_\_\_\_\_

**OTHERS** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Your Accounts

**CHECKING ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**SAVINGS ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**MONEY MARKET ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**LOAN ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

*If you have more than one*

**LOAN ACCOUNT** number

Where it is \_\_\_\_\_

\_\_\_\_\_

**LOAN ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**RETIREMENT ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**INVESTMENT ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

*If you have more than one*

**INVESTMENT ACCOUNT** number

\_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_

**TRUST/ENDOWMENTS**

Account number \_\_\_\_\_

Where it is \_\_\_\_\_

**CREDIT CARDS**

Account number \_\_\_\_\_

Where it is \_\_\_\_\_

*If you have more than one:*

**CREDIT CARDS**

Account number \_\_\_\_\_

Where it is \_\_\_\_\_

**CREDIT CARDS**

Account number \_\_\_\_\_

Where it is \_\_\_\_\_

**CREDIT CARDS**

Account number \_\_\_\_\_

Where it is \_\_\_\_\_

\_\_\_\_\_



*"Everybody at Dannel helped us pay tribute to Kathy in our own way. It was warm, loving, intimate, joyous, and really, just perfect. We had so many compliments on the service. We can't imagine receiving the same level of individual attention anywhere else." - DB, Denison*

**MONEY OWED TO ME**

This person, \_\_\_\_\_,

owes me \$\_\_\_\_\_ and can be reached at

\_\_\_\_\_

**MONEY I OWE TO INDIVIDUALS**

I owe this person \_\_\_\_\_,

this amount \$\_\_\_\_\_. He/she is located at

\_\_\_\_\_

\_\_\_\_\_

Other \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



*"Pat's sensitivity to family was wonderful. She acts with such discretion and caring professionalism, anticipating needs. The family was deeply grateful."*  
- FP, Sherman

# Your Treasures

You may wish to designate certain material items (whether they have monetary or sentimental value) to specific people. You may want to duplicate the list in your will, or see that your attorney has a copy.

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TREASURED ITEM** \_\_\_\_\_

Where it is located \_\_\_\_\_

Information about the item \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Others \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Last, The Stories

**I WAS NAMED AFTER** \_\_\_\_\_

and this is what I know about him/her \_\_\_\_\_

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**WHAT I LIKE ABOUT MY NAME IS** \_\_\_\_\_

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**MY FATHER** was born in \_\_\_\_\_ . He graduated from \_\_\_\_\_

and worked for \_\_\_\_\_

He died on \_\_\_\_\_ in \_\_\_\_\_

What I remember most about my dad is \_\_\_\_\_

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**MY MOTHER** was born in \_\_\_\_\_ . She graduated from \_\_\_\_\_

and worked for \_\_\_\_\_

She died on \_\_\_\_\_ in \_\_\_\_\_

What I remember most about my mother is \_\_\_\_\_

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This is what I know about how my parents met \_\_\_\_\_

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The first house I remember living in was in \_\_\_\_\_ and looked like

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My favorite childhood memory is \_\_\_\_\_

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A story I will never forget about my siblings and me was the time that \_\_\_\_\_

\_\_\_\_\_

My best friend growing up was \_\_\_\_\_ and this is why I liked him/her

\_\_\_\_\_

\_\_\_\_\_

The vacation I most remember growing up was when \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

My favorite subject in school was \_\_\_\_\_

One Christmas I remember from my childhood was \_\_\_\_\_

\_\_\_\_\_

My favorite pet was a \_\_\_\_\_ named \_\_\_\_\_. He/she was special to me because

\_\_\_\_\_

My first job was as a \_\_\_\_\_ at \_\_\_\_\_

What I remember most about that job is \_\_\_\_\_

\_\_\_\_\_

My first car was a \_\_\_\_\_ and what I remember about it was

\_\_\_\_\_

The best part about college was \_\_\_\_\_

\_\_\_\_\_

I met my spouse at \_\_\_\_\_

Our first date was to \_\_\_\_\_

The reason I fell in love with my spouse was \_\_\_\_\_

\_\_\_\_\_

We dated for \_\_\_\_\_ (days/weeks/months/years) before we got married.

What I liked most about being a parent was \_\_\_\_\_

\_\_\_\_\_

One of the things I wish I had done differently as a parent/spouse was \_\_\_\_\_

The most important thing my children taught me was \_\_\_\_\_

The funniest thing that ever happened on a birthday was \_\_\_\_\_

The things in life I am most proud of are \_\_\_\_\_

The place I most enjoyed visiting was \_\_\_\_\_

Looking back, the values I hold that matter are \_\_\_\_\_

What I hope my family will remember about me is \_\_\_\_\_

Anything else \_\_\_\_\_

Take care of your family.

We'll take care of  
everything else.

*Dannel*

**FUNERAL HOME**



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