

A Good Goodbye Planning Form

Use this planning form to write down key information for your eventual Good Goodbye. If you've downloaded the electronic form from AGoodGoodbye.com, you can type into the form and save it as a new file. Or simply print out the document and write the details on the paper. Consider doing a separate form for each adult in your household. Feel free to expand this document as needed.

The Big Stuff Needed for a Death Certificate in the U.S. (Includes The Five Things You Need to Know NOW Before Someone Dies)

Full Name (official first, middle and last on birth certificate):

Nick Name (what your friends usually call you):

Maiden Name (if female):

Date of Birth (month/day/year):

Place of Birth (city and state or foreign country):

Social Security Number:

Residence Address (street, city, state, zip):

Sex (male or female):

Father's Full Name:

Mother's Full Maiden Name (better know this!):

Marital Status (check one): single married divorced widow/widower

Surviving Spouse's Name (if wife, maiden name):

Served in U.S. Armed Forces (yes or no):

Preferred Method of Disposition:

Race:

Highest level of education:

Usual occupation (kind of work during career):

Veteran Information (Thanks for your service! We salute you.)

Service/Branch:

Date and Place of Enlistment:

Date of Discharge:

Rank and Service Number:

Veterans' Administration Claim Number:

War/Conflicts/Tours of Duty:

Commendations Received:

Marital History

Current Marriage (to name and date):

Previous Marriages (Names, dates of wedding and divorce finalization, current address and phone number of ex, notes):

Religious information

If atheist or agnostic, you can skip this section or write down what friend(s) you'd like to conduct a memorial service and where you'd like it held.

Religion:

House of Worship:

Address and Telephone:

Clergy to Contact:

Codes, Combinations and Online Passwords

Mark down user name and passwords for key online activities. Remaining live online after your demise can be problematic for your survivors. Note other codes or combinations needed to access important information.

Computer log-on or administrative access:

Internet Service Provider:

Email Provider:

Facebook Account:

Twitter Account:

Cell Phone Account:

Burglar alarm code/password:

Online Banking/Investment Accounts:

Online Merchant Accounts (i.e. Amazon, catalogues, stores):

Web Site(s) Administration:

Safe combination:

Family to Notify

When time is of the essence, can you easily assemble the names, addresses, emails and phone numbers for all your family and friends? *The Family Plot File* is an electronic data resource that will make contacting your family and friends so much easier and help smooth the way to a successful event. Download your copy today online through <http://AGoodGoodbye.com/to-die-for-shopping/>. For each as applicable, enter name, city/state, telephone, email, and notes.

Spouse:

Parent:

Parent:

Child:

Child:

Child:

Child:

Grandchild:

Grandchild:

Grandchild:

Grandchild:

Grandchild:

Grandchild:

Sibling:

Sibling:

Sibling:

Sibling:

Sibling:

Friends and Others to Notify

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Name, Telephone, Email:

Executor (Name, address, telephone, email)

Digital Executor – if different from Executor (Name, address, telephone, email)

Insurance Agent/Company (Name, address, telephone, email)

Attorney (Name, address, telephone, email)

Financial Advisor/CPA (Name, address, telephone, email)

Other Professional Advisors (Name, address, telephone, email)

Obituary News Bits

In addition to helping draft an informative obituary, these details can be used to notify other people who will want to know about the death. If you want help preparing a great obituary, contact Gail Rubin to discuss her obituary writing services:
Gail@AGoodGoodbye.com.

Education Include name of school, city and state, degree earned, dates attended.

High School:

Community College or Trade School:

University:

Graduate Degree(s):

Membership in Alumni Association(s):

Career Highlights Note companies worked for and dates, achievements, awards, etc.

Hobbies and Interests Note any pursuits or passions that play a large role in life.

Organizations to Contact

This is helpful to alert people who may be involved in your professional, community, or volunteer life. This can include unions, fraternal organizations, professional interest groups, volunteer services, and other community contacts. List the name of the organization, address, telephone, and if possible, a specific contact person. If no longer a member, you may want to note the dates of membership. Note if you'd like to name one of these organizations as a memorial donation beneficiary.

Organization:

Organization:

Organization:

Organization:

Organization:

Organization:

Newspapers or Publications for Obituary

List the local newspapers or trade publications that would be appropriate for either a paid obituary announcement or a news obit. Having the publication name, telephone and web site address handy is one less thing to stress about.

Publication:

Publication:

Publication:

Publication:

Publication:

Document Locator

Let your family know where the important documents are kept. Here's a quick run-down of what documents and other information your family will need to put their hands on if there's a medical emergency or death. Note "yes or no" regarding each piece, where it's located, an account number or other reference as needed, and any other notes.

Will:

Living Will:

Living Trust:

Medical Power of Attorney:

Durable Power of Attorney:

Cemetery Plot Deed:

Veteran DDE 214 Form:

Body/Organ Donor Information:

Safe Deposit Box:

Safe Deposit Box Key:

P.O. Box:

P.O. Box Key:

Automobile Title(s):

Birth Certificate:

Passport:

Divorce Papers:

Life Insurance:

Health Insurance:

Long Term Care or Disability Insurance:

Auto/Home Insurance:

Savings Accounts:

Checking Accounts/Checkbooks:

Credit Cards (account #s, toll-free phone):

Annuities:

Mortgage Papers/Deeds:

Income Tax Records:

Retirement Plans:

Government Benefit Statements:

Your Final Wishes

Sketch out what you envision for your Good Goodbye. Fill in responses as appropriate.

The saying goes, “You can’t pay someone to do your push-ups for you.” However, you can hire a personal trainer to make sure you do those push-ups. If you want help preparing your final arrangements, Gail Rubin is your personal trainer for funeral planning, your consumer advocate and informed advisor. Contact her at Gail@AGoodGoodbye.com to get your plans done today!

Pre-need arrangements made (if yes, name funeral provider and contact info):

Pre-need funding done (if yes, name company and contact info):

Disposition of Remains: (Burial, cremation, donation of body, other)

Prefer a funeral (body present) or a memorial service (cremains or not present):

Prefer a wake, viewing, picnic, wild party, other gathering:

If donating to science or medical school, list arrangements:

Cremated remains: (Bury, scatter, keep in urn, columbarium, share with family, other)

Cemetery plot or mausoleum crypt purchased (list section, block, plot):

Casket preference (material and price range):

Open or closed casket:

Embalming preference (yes or no):

Clothing, jewelry, other burial item preferences (such as eyeglasses):

Marker preference (headstone or plaque):

What do you want on your tombstone?

Location of funeral/memorial service:

Favorite flowers:

Memorial gifts in lieu of flowers:

Officiating clergy or friends:

Speakers – eulogy and readers:

Readings:

Music selections, musical instruments:

Casket bearers:

Honorary pallbearers:

Other special instructions: