



**Are you
prepared?**



Entiero na Kuota
seguro di entiero

Personal information

Name

Surname

Address

Telephone Number

Date of Birth

Passport Number

Marital Status*

Full Name of Partner

Children

Doctor/ Specialist

Special medical condition

Religion

Email(s)

Facebook

Twitter

LinkedIn

* It is recommended to have a marriage licence or divorce documents in one central place.

Funeral checklist

Some things should be settled immediately after a loved one passed away, even before the funeral. Other things can wait, a couple of days, even weeks or months. The general checklist below shows what needs to be done and when, at a glance.

Download the funeral checklist [here](#).

Immediately after passing (before the funeral)

Call the doctor on duty

Contact the funeral home

Contact funeral insurance company

Check the testament / will (if funeral wishlist is included in the will)

Check the donor registration

Arrange death certificate

Contact and inform important person(s)

Go through the funeral wish list

Arrange clothing

Immediately after my passing, the following persons must be informed:

Person 1

Address

Telephone Number

E-mail address

Person 2

Address

Telephone Number

E-mail address

Funeral checklist

Just after the funeral

- Contact notary for will
- Inform bank(s)
- Arrange new authorization (accounts)
- Inform employer
- Inform funeral insurance company, SVB
- Apply for survivor's/ orphan pension
- Inform authorities (health insurance company, SVB, tax authorities, utility companies.)

Within a few months

- Arrange custody (child benefits, study funding)
- Inventory of automatic transfers (creditcards)
- Inventory of bank balances
- Inventory of debts
- Inventory of possessions
- Collect insurance money
- Open the safe deposit box
- Securities and real estate property check
- Distribute estate

My finances

Besides the huge grief, death also has financial consequences. For example, think of the cost of a funeral, or the loss of a portion of income. In addition, all kinds of practical matters must be taken care of, such as the cancellation of current and/or savings accounts and cashing policies. In this chapter you will find out more about your finances.

It is recommended to keep proof of ownership/ debt in one central place.

Insurance

Following the passing away of a loved one, the relative(s) should inform the insurance company. On the following pages you can indicate which insurance policies you have.

Funeral Insurance	Yes	No
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Funeral insurance covers a part of the cost of the funeral.

Insurance company:

Policy number:

Phone number insurer:

Information insurance broker:

Other important information regarding funeral insurance:

My finances

Life insurance

Yes

No

A life insurance ensures that after a loved one passed away, money is released to the partner or the family. For example, to repay the mortgage.

Fire insurance

Yes

No

Health and disability insurance

Yes

No

Car insurance

Yes

No

Other insurance

Insurance company:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Policy number:

Phone number insurer:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Insurance broker:

My finances

Pension

Yes

No

Many people have pensions. When they change jobs, they often take their pensions with them, but not always. You make it easier and save a lot of time for your loved ones if you mention your pension information here:

Pension fund / Insurer:

- 1.
- 2.
- 3.

Policy Number:

Phone number pension fund:

- 1.
- 2.
- 3.

Insurance broker:

Investments

Business

Real estate

Other important information:

Note: Some pension funds (including SVB) give the family of the deceased a few months of the monthly pension.

My finances

Bank

After a loved one passed away, it is recommended to contact the banks to cancel accounts and/or credit cards. The bank will block the account immediately. All power of attorney signed by the deceased will automatically expire. However you can still make payments for the following providing an invoice; funeral expenses, hospital bills, utility bills.

It is safer to NOT write down any PIN numbers or passwords in this booklet. However do provide this information to your loved ones where they can access this information.

Checking Account(s)

Account number:

- 1.
- 2.
- 3.

Bank:

Savings Account(s)

Account number:

- 1.
- 2.
- 3.

Bank:

and/or
and/or
and/or

Creditcard(s)

Account number:

- 1.
- 2.
- 3.

Bank:

and/or
and/or
and/or

My finances

Mortgage(s)

Yes

No

Account number:

- 1.
- 2.
- 3.

Bank:

Other debt(s)

Yes

No

Bank

Cooperative

Other

Safety deposit box

Yes

No

Information about safe deposit box(es) or any other form of storage:

My finances

Subscriptions and associations e.g. magazines (online/offline), sports club etc.

-
-
-
-
-
-
-
-
-

What is also important to mention here:

My inheritance

Even after you pass away, you remain present with those you love, in what you leave behind. Many people don't talk or think about it while they are still here, and that's understandable. Therefore it is good to write down some of your wishes. So the bereaved know exactly where they stand.

Debts and Assets

Your family inherits your possessions and debts. Who inherits what, is determined by law. If you want to deviate from this, it is recommended that you make a will.

Testament / Will

Yes No

A will is an official document drawn up by a notary. It captures what to do with your estate.

Made by (name notary):

Phone number:

I wish to assign custody of my children to (its is recommended to include this in a will):

Name

Adress

Telephone number

Other important documents to have in one place

- Letter of instructions
- Financial power of attorney
- Personal & medical history
- Durable health care power of attorney
(Allows you to name a person to direct your health care when you cannot do so)
- Authorization to release health care information
- Living will
(You describe what medical care and treatments you do or do not want to receive)
- Do not resuscitate order
(A NTBR form is a specific document that must be signed by the patient, and alerts the medical staff that in the event that your heart stops beating or you stop breathing, your desire is to not be reanimated)

Other important information regarding my inheritance:

Some prepare their farewell in detail, others leave this to their relatives. In any case it is nice to know your basic wishes. Be creative, the purpose of a funeral is to capture the story of a person's life and share it so loved ones know an important life was lived.

My wish list

A personalized funeral helps the bereaved to cope with loss. Your wishes can be attended below.

For when my life transforms, I want:

to be buried

would like a memorial stone on my grave

Yes

No

- I would like a(n)

Granite small: 15x40/20x40

Granite large: 40x40/60x40

I prefer the following text on the memorial stone:

I prefer the following cemetery:

Location:

My farewell

to be cremated

I want my ashes to be:

kept in an urn scattered at sea scattered at another location

Location

I would like a wake night before funeral

Location: Home Funeral Home

Other

Personal funeral wishes

I wish my funeral to take place:

Quietly and privately

In a(n) church mosque synagogue temple other place

In the auditorium of the funeral home, the cemetery, crematory or other place

Preferred funeral home: El Tributo

Address:

Telephone number:

At my funeral i would like (a) speech(es) Yes No

Preferably by:

My farewell

I would like to have music during my funeral Yes No

Live music Streaming/CD

I prefer these songs or genre:

I have special requirements for the location of condolence Yes No

In the tribute room of the funeral home, the cemetery or crematorium
elsewhere, namely

I have special wishes for catering during or after the condolence Yes No

Example:

Any other requests/ wishes:

Any other special requests:

My farewell

Clothing wishes:

Jewelry / glasses:

I wish that the coffin is closed

during the condolence ceremony

at the last minute

During my lying in state and funeral i wish to have flowers Yes No

I prefer the following flowers:

I wish the funeral to take place from:

My home The house of mourning The place where my body is laid out

I would like transportation

a hearse and following cars, specific color of hearse

otherwise,

namely

My farewell

I wish to be burried/ cremated in a Coffin

I have special wishes regarding my coffin Yes No

My wishes are:

I would like a News paper ad Radio ad TV ad Facebook ad

Newspaper(s):

Radiostation(s):

TV channel(s):

I want the ad to include:

Note: It is recommended to make a family and friends list in advance to include in the ad.

Food and beverage during condolence:

After burial/cremation:

Additional notation(s)
