

# Plan

*for peace of mind*

Baltimore Life



Insuring America Since 1882

# Plan

for peace of mind

## Vital Information *(for death certificate)*

Name \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_ Place of Birth \_\_\_\_\_

Current Address \_\_\_\_\_

Marital Status \_\_\_\_\_

Name of Spouse \_\_\_\_\_

Maiden Name \_\_\_\_\_

If Veteran, Serial # \_\_\_\_\_

Branch of Service \_\_\_\_\_

Rank \_\_\_\_\_

Date Entered Service \_\_\_\_\_ Date Discharged \_\_\_\_\_

Union / Fraternal Organizations \_\_\_\_\_

## Family Information

Father's Name \_\_\_\_\_

Mother's Name \_\_\_\_\_

Mother's Maiden Name \_\_\_\_\_

Children's Names \_\_\_\_\_

## Funeral Requests

I Prefer:  Burial  Entombment  Cremation

Preferred Funeral Home \_\_\_\_\_

Cemetery Name \_\_\_\_\_

Director \_\_\_\_\_

## Service to be Held

Place of Worship  Funeral Home  Other

If Place of Worship, Name \_\_\_\_\_

Presider \_\_\_\_\_

Requested Pallbearers \_\_\_\_\_

Favorite Hymns \_\_\_\_\_

Flowers \_\_\_\_\_

Contributions \_\_\_\_\_

Special Requests \_\_\_\_\_

### Key Family Members to Contact

Name \_\_\_\_\_ Email \_\_\_\_\_

Phone # \_\_\_\_\_ Mobile # \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Phone # \_\_\_\_\_ Mobile # \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Phone # \_\_\_\_\_ Mobile # \_\_\_\_\_

### List All Insurance Policies: life, health, home, auto

Policy # \_\_\_\_\_ Company \_\_\_\_\_ Type \_\_\_\_\_

Policy # \_\_\_\_\_ Company \_\_\_\_\_ Type \_\_\_\_\_

Policy # \_\_\_\_\_ Company \_\_\_\_\_ Type \_\_\_\_\_

### Credit Cards

Company \_\_\_\_\_ Account # \_\_\_\_\_

Company \_\_\_\_\_ Account # \_\_\_\_\_

Company \_\_\_\_\_ Account # \_\_\_\_\_

### Checking Accounts

Institution \_\_\_\_\_ Account # \_\_\_\_\_

Institution \_\_\_\_\_ Account # \_\_\_\_\_

### Savings Accounts

Institution \_\_\_\_\_ Account # \_\_\_\_\_

Institution \_\_\_\_\_ Account # \_\_\_\_\_

### IRA or Investment Accounts

Institution \_\_\_\_\_ Account # \_\_\_\_\_

Institution \_\_\_\_\_ Account # \_\_\_\_\_

Institution \_\_\_\_\_ Account # \_\_\_\_\_

### Legal and Financial Matters

Executor of Estate \_\_\_\_\_

Attorney \_\_\_\_\_

## Location of Important Papers

Safe Deposit Box \_\_\_\_\_  
Will and Testament \_\_\_\_\_  
Birth Certificate \_\_\_\_\_  
Marriage Certificate \_\_\_\_\_  
Stocks and Bonds \_\_\_\_\_  
Certificates of Deposit \_\_\_\_\_  
Military Records \_\_\_\_\_  
Savings Passbooks \_\_\_\_\_  
Automobile Papers \_\_\_\_\_  
Insurance Policies \_\_\_\_\_  
Mortgage/Property Deeds \_\_\_\_\_  
Tax Information \_\_\_\_\_

## Where to Keep Important Papers

Some people place important papers in a safe deposit box. However, this is not necessarily a good idea.

State laws generally require safety deposit boxes to be sealed when someone dies. As a result, beneficiaries may not have access to necessary information.

## Home is Best


Storing important papers at your home in a fire-safe file is fine. Leaving this guide for your beneficiaries will allow you to reach out to your loved ones and help them deal thoughtfully with the final inevitable reality of life.

## Baltimore Life

*Seven generations of service*

Since 1882, Baltimore Life has been there for its policyholders, keeping them financially protected and free from worry. The company follows safe and conservative financial practices that have carried it through World War I, the Great Depression and World War II.





*Far too frequently, funeral service directors have seen the difficulty loved ones have in making final arrangements. As a service to you and your loved ones, The Baltimore Life Insurance Company has prepared this guide to assist you in recording important information which will enable your family to handle your final affairs with your wishes in mind.*

*Your faithful and consistent recording of your personal and financial interests, even as they change, will provide a priceless reference when your family circle is broken. We suggest that you keep this booklet in a safe place that is immediately accessible to your loved ones.*

*To My Loved Ones:*

*It is my wish that you be spared from anxiety, expense and inconvenience at the time of my passing.*

*In these pages, I have recorded vital information that will be needed, and a list of important documents and their location.*

*If you will provide the information on the inside front cover to my funeral director, everything will be conducted according to my wishes.*

*I sincerely hope you will find these arrangements satisfactory and that they will help you retain a warm memory of the wonderful years we have spent together.*

*Signature* \_\_\_\_\_

*Date of Completion* \_\_\_\_\_

*Updated* \_\_\_\_\_



The Baltimore Life®  
COMPANIES

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