# **Our Family Legacy Drawer**

To Our Family and Loved Ones:

Inside of this file or drawer, you will find important information that is related to our lives. In the event of a tragedy or accident, this information will help you take care of any issues or business matters on our behalf.

You will find information pertaining to things like our last will and testament, power of attorney, important documents, insurance policies, and more.

This folder was put together in an effort to make things easier for you during a difficult time. This is just one more way of expressing our love to you during our absence.



#### Will & Estate Information Sheet



After filling out the form below, include it in your legacy drawer file for easy reference. Married couples should fill out a form for each spouse.

Name:

Location of NOTARIZED copy:

Date of Notarization:

Locations of any copies of the will:

Who are the executor / exuctrix?		(Circle one)
Primary:	Do they have a copy of the will?	YES NO
Secondary:	Do they have a copy of the will?	YES NO
	Location of NOTARIZED copy:	
	Date of Notarization:	
Who is the healthcare Power of Attorney? (Living Will)		(Circle one)
Primary:	Have you explained to them your wishes?	YES NO
Secondary:	Have you explained to them your wishes?	YES NO
	Location of NOTARIZED copy:	
	Date of Notarization:	
Who is the financial Power of Attorney?		(Circle one)
Primary:	Have you explained to them your wishes?	YES NO
Secondary:	Have you explained to them your wishes?	YES NO
	Location of NOTARIZED copy:	
	Date of Notarization:	

#### **Financial Accounts Log**



Fill out the form below for each financial account you have. This includes banking, retirement, savings, CDs, mutual funds, etc.

Account Name	Authorized Account Users	Name, Address, and Phone Number of Institution	Account Number	Any auto drafts?
1				YES
				NO
2				YES
				NO
3				YES
				NO
4				YES
				NO
5				YES
				NO
6				YES
				NO
7				YES
				NO
8				YES
				NO

#### **Funeral Instructions**



After filling out the form below, include it in your legacy drawer file for easy reference. Please attach additional instructions to this form. Married couples should fill out a form for each spouse.

#### Name:

Are you a part of a Church or other religious organization?	What funeral home would like your family to use?
Name:	Funeral Home Name:
Address:	Address:
Phone Number:	Telephone:
Pastor/Leader:	

Who would you like to have participate at your Memorial Service?		
Funeral Officiant / Speakers:	Speakers:	
Music Director:		
Pallbearers:		

Where would you like your memorial service to take place?	Are there any organizations you would like people to make donations to in your honor?
Name:	Name:
Address:	Address:
Phone Number:	Phone Number:

What are your instructions for handling your remains, and where would you like to be placed?

What additional instructions would you like to include (ie. music, displays, food,)?

Please use the back of this page or attach additional pages if needed.

#### **Insurance Policies Log**



Fill out the form below for each insurance policy you have. This includes health, car, disability, etc.

Insurance Type / Description	People insured on this policy	Name, Address, & Phone Number of Agency	Policy Number	Notes:
1				
2				
3				
4				
5				
6				
7				
8				

#### **Important Documents Log**



Fill out the form below for each important/legal document you have. This includes items such as deeds, birth certificates, titles, etc.

Document Description	Location of the document	Notes:
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		

### **Legacy Letters**



If you have written a letter, recorded a video, or left some other type of inspirational message for your loved ones, please list where the information can be found and who it is for.

List Location and descriptions of each Legacy letter below.
To:
Location:
<b>T</b>
To:
Location:
To:
Location:
To:
Location:
To:
Location:
To:
Location:
To:
Location:
To:
Location:

#### **Monthly Budget Log**



After completeing your budget for the month, print it off and include it in your legacy folder or make note of the location where you keep your budgets and how to access it. If you have made reservations for any future events, trips, etc. that could result in additional expenses in the event you do not cancel in time, make note of them below.

Where do you keep each month's budgets?

List your Latest Budget (Month/Year)	List Future Events or Plans You Have Made	Event Contact Information	Cost	Latest Cancel Date

# **Tax Returns Log**



You should keep a copy of the last 2-3 years of your tax returns. Use the log below to note where they are located.

Tax Return Year	Location	Notes:

#### Safety Deposit Boxes (Safes) Log



If you have a safety deposit box or safe where you keep personal and important items, list them here and include this form in your legacy drawer.

Location of Saftey Deposit Box or Safe? List address and phone number if applicable.	Where is the key located or what is the combination?	Instructions for access.

Item	Date Listed	Date Removed

## **Passwords & Combination Log**



Take some time to log any website, email account, or other item that is secure.

Item (ie. website, debit card, safe, email )	Username?	Password / Combination	URL or Location