

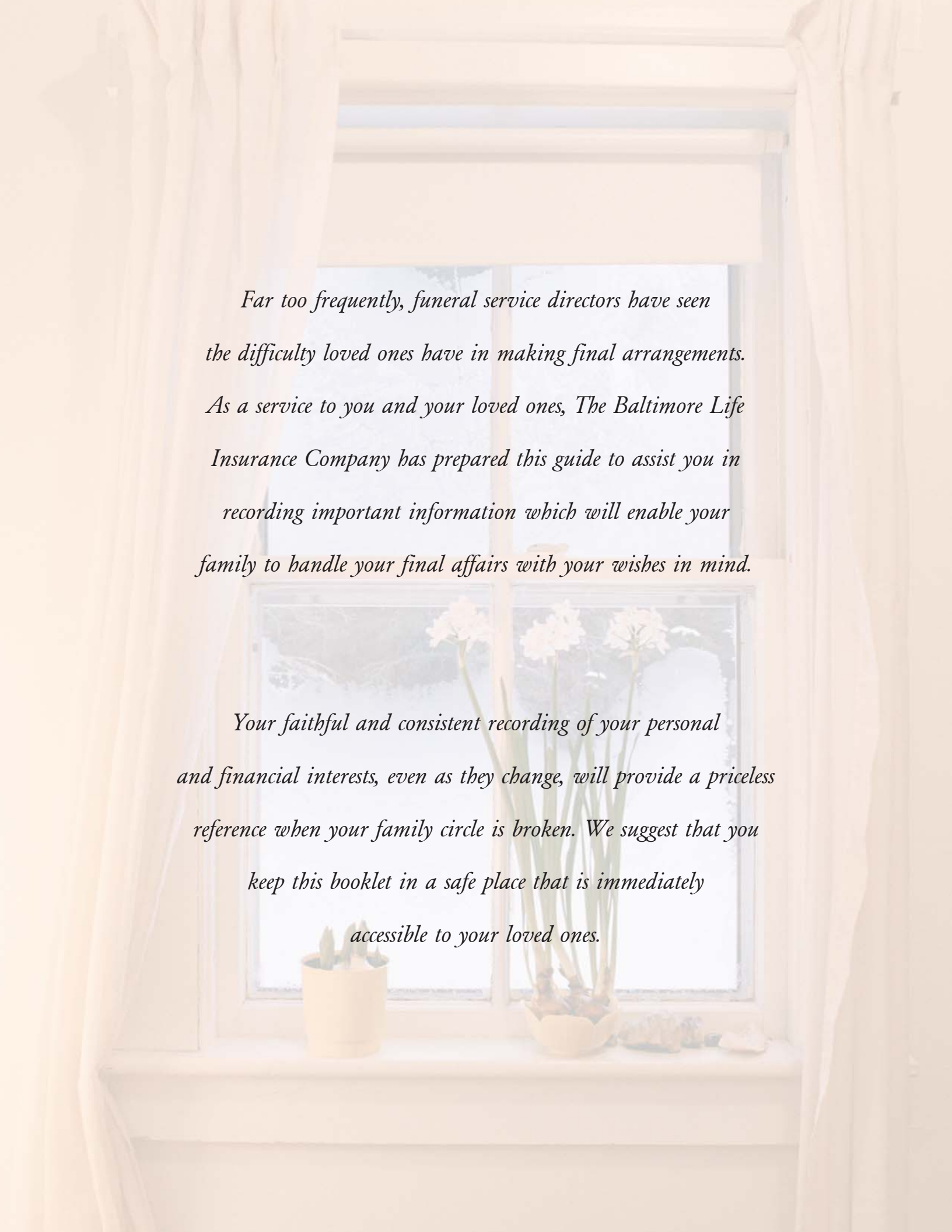
Plan

for peace of mind

Baltimore Life



Insuring America Since 1882



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.

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 _____ Phone # _____
Name _____ Phone # _____
Name _____ Phone # _____

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. The Baltimore Life Companies are members of the Insurance Marketplace Standards Association (IMSA). Membership promotes ethical market conduct for individual life insurance and annuities.



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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