

# My Legacy

A guide for getting your affairs in order



Name: \_\_\_\_\_ Date: \_\_\_\_\_

*It is often difficult to think to the future of you not being here, but is extremely important to those you love. Taking the time to fill out this packet of information about yourself will help your loved ones at a time when they truly need it most.*

*We suggest you complete this record and keep it in a safe place. You should also keep a copy of this in your Client Access Vault which you can access by logging into your accounts online at [www.prosperwell.com](http://www.prosperwell.com).*

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## PERSONAL INFORMATION

<b>Name</b>	
<b>SSN</b>	
<b>Date and Place of Birth</b>	
<b>Home Address</b>	
<b>2<sup>nd</sup> Property Address</b>	
<b>Employer Address</b>	
<b>Cell Phone</b>	
<b>Marital Status</b>	Married   Divorced   Widowed   Single   Separated
<b>Date and Place of Marriage</b>	
<b>Spouse Name and Phone</b>	
<b>Former Spouse Name and Phone</b>	
<b>Date and Place of Marriage</b>	
<b>Date and Place of Divorce</b>	

## CHILDREN'S INFORMATION

Given Name	DOB	Place of Birth	SSN	Phone/Email

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## FAMILY INFORMATION

### Grandchildren

Given Name	DOB	Place of Birth	SSN	Phone/Email

### My Parents

Given Name	DOB	Place of Birth	SSN	Phone/Email

### Brothers and Sisters

Given Name	DOB	Place of Birth	SSN	Phone/Email

### Spouse's Parents

Given Name	DOB	Place of Birth	SSN	Phone/Email

### Spouse's Brothers and Sisters

Given Name	DOB	Place of Birth	SSN	Phone/Email

If any of the above family members are deceased, please indicate date of death next to the name.

**IN CASE OF EMERGENCY THESE PEOPLE MUST BE NOTIFIED**

<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	<b>Phone:</b>
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	<b>Phone:</b>
<b>Name:</b>	<b>Relationship:</b>
<b>Address:</b>	<b>Phone:</b>

**IMPORTANT BUSINESS/PERSONAL CONTACTS TO BE NOTIFIED**

<b>Supervisor:</b>	
<b>Company:</b>	<b>Phone:</b>
<b>Physician:</b>	
<b>Company Name:</b>	
<b>Email:</b>	<b>Phone:</b>
<b>Estate Planning Attorney:</b>	
<b>Company Name:</b>	
<b>Email:</b>	<b>Phone:</b>
<b>Business Attorney:</b>	
<b>Company Name:</b>	
<b>Email:</b>	<b>Phone:</b>
<b>Wealth Advisor:</b>	
<b>Company Name:</b>	
<b>Email:</b>	<b>Phone:</b>
<b>CPA:</b>	
<b>Company Name:</b>	
<b>Email:</b>	<b>Phone:</b>

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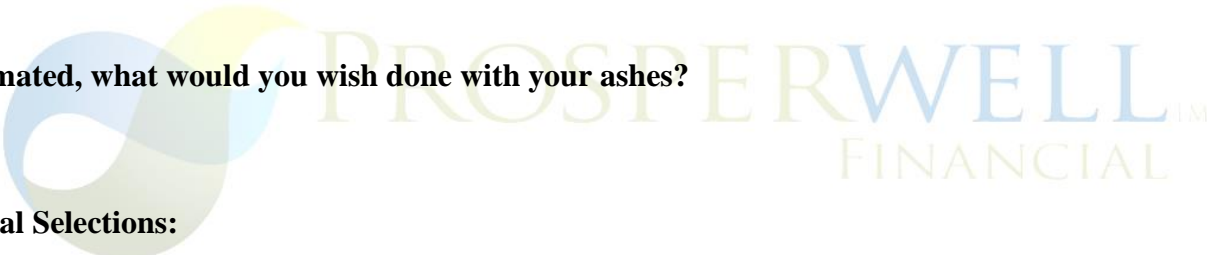


## FINAL WISHES

<b>Church:</b>	<b>Religion:</b>
<b>Funeral Home:</b>	<b>Clergy:</b>
<b>Pre-Paid Burial Plan:</b>	<b>Funeral Services at:</b>
<b>Internment   Entombment   Cremation</b>	
<b>Cemetery:</b>	
<b>Lot Purchased:</b>	<b>Lot Name:</b>
<b>I would like the following persons act as pallbearers:</b>	

**Would you want an obituary published?      Yes   No      What would you like it to say?**

**If cremated, what would you wish done with your ashes?**



**Musical Selections:**

**Special Requests for Service:**

**Will Information**

<b>Last Will Date:</b>			
<b>The Executor is:</b>			
<b>Living Will:</b>	<b>Yes</b>	<b>No</b>	
<b>Living Will Location:</b>			
<b>Irrevocable Trust:</b>	<b>Yes</b>	<b>No</b>	<b>Trustee:</b>
<b>Revocable Trust:</b>	<b>Yes</b>	<b>No</b>	<b>Trustee:</b>
<b>Location of Trust:</b>			
<b>Healthcare Directive:</b>	<b>Yes</b>	<b>No</b>	
<b>Durable Power of Attorney:</b>	<b>Yes</b>	<b>No</b>	<b>Who:</b>

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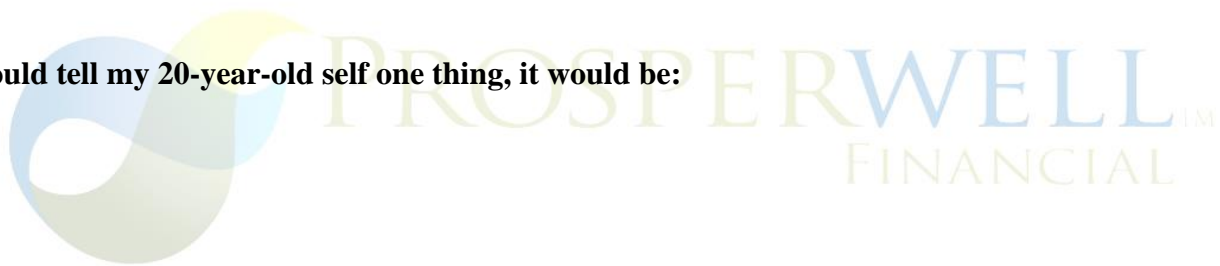
## **Organ Donation**

- Organ donation is noted on my Driver's License**
- I DO NOT want any of my organs donated**
- I would like to donate ANY organs needed for transplant**
- I would like to donate my body for research**
- I would like to donate only the following organs for transplant/research (List Below):**

**My favorite money memory is:**

**What is the biggest risk you ever took?**

**If I could tell my 20-year-old self one thing, it would be:**



**Did someone tell you something when you were young that has stuck with you?**

**What would you have done differently in your life?**

**What do you consider your best decisions?**

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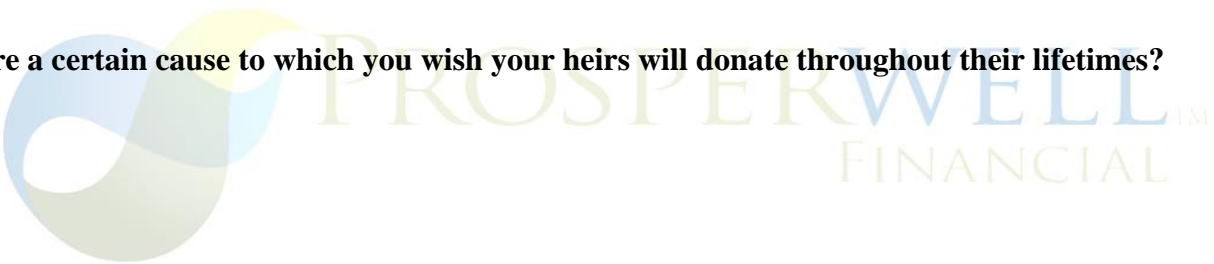
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**Do you have any regrets?**

**Where do you believe money is best spent?**

**What values regarding money do you hope to impart on your heirs?**

**Is there a certain cause to which you wish your heirs will donate throughout their lifetimes?**



**Are there any particular assets you hope to keep in the family for future generations?**

**What qualities of yours do you hope become family values?**

**What is your idea of “legacy” and what do you want yours to be?**

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