

Before They Have to Ask

PLANNING GUIDE





**Someone is sitting in
the shade today because
someone planted a tree a
long time ago.**

- Warren Buffett



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Vital Statistics

FULL NAME: _____

ADDRESS: _____

DATE OF BIRTH: _____

SOCIAL SECURITY NUMBER: _____

NEXT OF KIN: _____

FATHER'S LEGAL NAME & PLACE OF BIRTH: _____

MOTHER'S LEGAL NAME & PLACE OF BIRTH: _____

MARITAL STATUS: _____

EDUCATION: _____

OCCUPATION: _____



Funeral Preferences

Give your own answers to these sensitive decisions:

NAME OF SERVICE PROVIDER: _____

PROVIDER ADDRESS: _____

PROVIDER PHONE NUMBER: _____

NAME OF CLERGY: _____

FUNERAL/CREMATION: _____

IF YOU ARE BEING CREMATED, WOULD YOU PREFER A SERVICE BEFORE OR AFTER CREMATION?

VISITATION/WAKE:

- ☐ Public
- ☐ Private
- ☐ Location

SERVICE PREFERENCES:

- | | | |
|---------------------------------|---------------------------------|-------------------------------------|
| ☐ Church | ☐ Public | ☐ Non-Religious |
| ☐ Chapel | ☐ Private | |
| ☐ Graveside | ☐ Religious | |

PALL-BEARERS: _____

PARTICIPANTS: _____

TAKE-AWAY/KEEPSAKES: _____

FLOWERS: _____

CATERING: _____

Cemetery Preferences

Indicate important decisions:

NAME OF CEMETERY: _____

CEMETERY ADDRESS: _____

CEMETERY PHONE NUMBER: _____

TYPE OF CEMETERY ARRANGEMENTS:

- Family Area
- Companion Spaces
- Single Spaces

TYPE OF CEMETERY SPACES:

- Above Ground
- Below Ground

TYPE OF MEMORIAL:

- Upright Monument
- Flat Memorial

OUTER BURIAL CONTAINER:

- ☐ Vault ☐ Liner ☐ Lawn Crypt
(Pre-Installed) ☐ Not Needed For
Above Ground

COMMITTAL SERVICES OPTIONS:

- ☐ Public
 ☐ Private
 ☐ Doves
 ☐ Balloons
- ☐ Music
 ☐ Mariachi

ADDITIONAL COMMENTS:

Contacts & Documents



Attorney:

NAME: _____

FIRM: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____

EMAIL: _____

Financial Advisor:

NAME: _____

FIRM: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____

EMAIL: _____

Power of Attorney:

NAME: _____

FIRM: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____

EMAIL: _____

Executor:

NAME: _____

FIRM: _____

ADDRESS: _____

CITY/STATE/ZIP: _____

PHONE: _____

EMAIL: _____

Contacts & Documents

Location of important documents:

WILL:

LIVING WILL:

AUTOMOBILE TITLE:

INCOME TAX RECORDS:

SAFETY DEPOSIT KEY:

BIRTH CERTIFICATE:

SOCIAL SECURITY CARD:

PASSPORT:

CITIZENSHIP PAPERS:

OTHER:

The New Front Door:

There was a time when all a family needed was a key to the house and a copy of the will. Today they also need the passcode to a phone. Bank accounts, utilities, photographs, email — even the ability to cancel a streaming subscription — nearly everything now sits behind a locked screen and a six-digit code sent to a device only you can open.

A family that has every password you ever wrote down can still be locked out of everything. Passwords are the first lock, not the last. The pages in this section walk through every lock in the chain, in order: your phone, your two-step verification codes, your recovery email, your security questions, and your backup codes.

How To Use This Section:

Work through the pages in order — each one unlocks the next. Fill them in with your counselor or on your own, in pencil, and revisit once a year or whenever you change phones. Twenty minutes here can save your family months.

Storing This Safely:

Once complete, this section opens your entire digital life. Store this guide as you would a passport or a will: a locked drawer, a home safe, or with your attorney. Tell one trusted person where it is — that sentence is as important as any page in this book.

My Phone & Devices

Primary Phone:

The phone is the master key. Nearly every code, reset link, and confirmation arrives here first — this page must be completed for the rest of the section to work.

MAKE AND MODEL:	
PHONE NUMBER:	
CARRIER:	
SCREEN PASSCODE:	
CARRIER ACCOUNT PIN / PASSWORD:	
SIM PIN (IF SET):	
WHO ELSE CAN UNLOCK THIS PHONE:	

Other Devices:

DEVICE (TABLET, COMPUTER, WATCH)	PASSCODE / PASSWORD	NOTES

DATE COMPLETED / LAST REVIEWED:	
---------------------------------	--

Two-Step Verification

Authenticator Apps I Use:

Many accounts ask for a second code after the password — from a text message, an email, or an authenticator app. These pages record where each code goes and where the backup codes live.

APP (GOOGLE AUTHENTICATOR, AUTHY, DUO)	ON WHICH DEVICE	APP PIN, IF ANY

Accounts With Two-Step Verification:

Some accounts now open with your face or fingerprint instead of a password — that is a passkey. A passkey cannot be written down: it lives on your device. For those accounts, mark the last column — your screen passcode and your Apple or Google account are the way in, and the Legacy Access Settings on the next page are the official path for your family.

ACCOUNT	WHERE THE CODE GOES (TEXT / EMAIL / APP)	BACKUP CODES STORED WHERE	PASSKEY?

Backup codes are one-time codes most services offer for exactly this situation — they work when the phone cannot be opened. If you have never downloaded yours, do it this week and note the location above. This single row can spare your family a locked account.

Account Recovery

My Primary Email Account:

Password resets go to a recovery email or phone. If that inbox is closed — an old work address, a provider you left — the reset chain breaks here.

EMAIL ADDRESS:

PASSWORD:

ITS RECOVERY EMAIL / PHONE:

TWO-STEP CODES GO TO:

Old or Work Email Still on My Accounts:

OLD ADDRESS	STILL ACCESSIBLE?	USED AS RECOVERY FOR WHICH ACCOUNTS

Security Prompts and Answers:

ACCOUNT	PROMPT	MY EXACT ANSWER

Legacy Access Settings:

Apple, Google, and Facebook each let you name someone to access your account after death. Set these once and note it here — they are the official path, they work even when everything else fails, and for accounts that use passkeys they are the only reliable way in.

SERVICE (APPLE LEGACY CONTACT, GOOGLE INACTIVE ACCOUNT MANAGER, FACEBOOK LEGACY CONTACT)	SET UP?	PERSON NAMED

Subscriptions & Recurring Charges

Everything That Bills Automatically:

Services keep billing until someone cancels them — and each one has its own login. List everything that charges a card or account automatically: streaming, cloud storage, memberships, deliveries, apps. A quick way to find them all: look through three months of statements and note every repeating charge.

SERVICE	BILLED TO (CARD / ACCOUNT)	ABOUT HOW MUCH	HOW TO LOG IN / CANCEL

Military Service



Thank you for your service! Let us know the details:

BRANCH OF SERVICE: _____

SERVICE ENTRY DATE/PLACE: _____

LOCATION OF DISCHARGE PAPERS:

TYPE OF DISCHARGE: _____

RANK: _____

HONORS:

Family History

MATERNAL GRANDPARENTS: _____

MOTHER: _____

AUNT/UNCLE: _____

COUSINS:

PATERNAL GRANDPARENTS: _____

FATHER: _____

AUNT/UNCLE: _____

COUSINS:

SIBLINGS:

CHILDREN:

NIECES/NEPHEWS:

GRANDCHILDREN:

Accomplishments

Guide your story in your own words:

MY FAVORITE THINGS (MUSIC/FOOD/HOBBIES/MEMORIES):

MY PERSONAL ACCOMPLISHMENTS (FAMILY/GOALS/ACHIEVEMENTS):

MY CAREER ACCOMPLISHMENTS (AWARDS/ACHIEVEMENTS/HONORS/RECOGNITIONS):

MY FONDEST MEMORIES (FAMILY/FRIENDS):

MY BIGGEST MILESTONES (CELEBRATED/NON-CELEBRATED):



Preparing for death is one of the most empowering things you can do. Thinking about death clarifies your life.



- CANDY CHANG

In your own words

What details would you like to include in your obituary:

Assets and Obligations

Bank Accounts:

NAME OF BANK: _____

NAME ON ACCOUNT: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON ACCOUNT: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON ACCOUNT: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON ACCOUNT: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

Real Estate:

ADDRESS: _____

LENDER: _____

LOAN NUMBER: _____

DEED INFO: _____

DEED LOCATION: _____

ADDRESS: _____

LENDER: _____

LOAN NUMBER: _____

DEED INFO: _____

DEED LOCATION: _____

Assets and Obligations

Vehicles:

MAKE/MODEL/YEAR: _____

LENDER: _____

LOAN NUMBER: _____

MAKE/MODEL/YEAR: _____

LENDER: _____

LOAN NUMBER: _____

MAKE/MODEL/YEAR: _____

LENDER: _____

LOAN NUMBER: _____

MAKE/MODEL/YEAR: _____

LENDER: _____

LOAN NUMBER: _____

Loans:

NAME OF BANK: _____

NAME ON LOAN: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON LOAN: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON LOAN: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

NAME OF BANK: _____

NAME ON LOAN: _____

ACCOUNT NUMBER: _____

ACCOUNT TYPE: _____

USERNAME: _____

PASSWORD: _____

Assets and Obligations

Insurance Policies:

TYPE OF INSURANCE: _____

NAME OF INSURANCE:

NAME ON POLICY:

POLICY NUMBER: _____

LOCATION OF POLICY DOCUMENTS:

TYPE OF INSURANCE: _____

NAME OF INSURANCE:

NAME ON POLICY:

POLICY NUMBER: _____

LOCATION OF POLICY DOCUMENTS:

TYPE OF INSURANCE: _____

NAME OF INSURANCE:

NAME ON POLICY:

POLICY NUMBER: _____

LOCATION OF POLICY DOCUMENTS:

TYPE OF INSURANCE: _____

NAME OF INSURANCE:

NAME ON POLICY:

POLICY NUMBER: _____

LOCATION OF POLICY DOCUMENTS:

Notes:

Caring for Our Furry Friends

Provide for your pet's future without you:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

PET'S NAME:

DESIGNATED CAREGIVER:

Farewell Message

Use this space for a last farewell message that can be left on social media to your friends, family or the world.

Notes

“Preplanning is a tender letter your family opens on their hardest day,
and finds everything already done, with love.”



ALWAYS HERE TO HELP

(239) 417-5000

fullernaples.com

NAPLES

1625 Pine Ridge Road, Naples, FL 34109

EAST NAPLES

4735 Tamiami Trail, East Naples, FL 34112

We answer the phone 24 hours a day, 7 days a week
Business hours Monday to Saturday, 8:30 - 5:30
Visits by appointment

Before They Have to Ask

A planning guide from Fuller Funeral Home & Cremation Services