

# Preferences and Information List

## STATEMENT OF DESIRES & LOCATION OF PROPERTY & DOCUMENTS

I, \_\_\_\_\_, am signing this document as the expression of my desires as to the matters stated below, and to inform my family members or other significant persons of the location or certain property and documents in the event of any emergency or of my death.

**I. Funeral Desires.** It is my desire that the following arrangements be made for my funeral and disposition of remains in the event of my death (state if you have made any arrangements, such as pre-paid burial plans, cemetery plots owned, etc.):

- Burial at \_\_\_\_\_  
\_\_\_\_\_
- Cremation at \_\_\_\_\_  
\_\_\_\_\_
- Other specific desires:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. Pets.** I have the following pet(s): \_\_\_\_\_  
\_\_\_\_\_. The following are my desires concerning the care of said pet(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**III. Notification.** I would like the following person(s) notified in the event of emergency or death (give name, address and phone number):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IV. Location of Documents.** The following is a list of important documents, and their location

- Last Will and Testament, dated \_\_\_\_\_. Location: \_\_\_\_\_  
\_\_\_\_\_
- Durable Power of Attorney, dated, \_\_\_\_\_. Location: \_\_\_\_\_  
\_\_\_\_\_
- Living Will, dated \_\_\_\_\_. Location: \_\_\_\_\_  
\_\_\_\_\_
- Deed(s) to real estate (describe property location and location of deed):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Title(s) to vehicles (cars, boats, etc.) (Describe vehicle, its location, and location of title, registration, or other documents).  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
- Life insurance policies (list name, address & phone number of insurance company and insurance agent, policy number, and location of policy):  
 \_\_\_\_\_  
 \_\_\_\_\_
- Other insurance policies (list type, company & agent, policy number, and location of policy): \_\_\_\_\_  
 \_\_\_\_\_
- Other: (list other documents such as stock certificates, bonds, certificates of deposit, etc., and their location)

**V. Location of Assets.** In addition to items readily visible in my home or listed above, I have the following assets:

- Safe deposit box located at \_\_\_\_\_, box number \_\_\_\_\_. Key located at: \_\_\_\_\_.
- Bank accounts (list name & address of bank, type or account, and account number):  
 \_\_\_\_\_
- Other (describe the item and give its location):  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**IV.** Other desires or information (state any desires or provide any information not given above; use additional sheets of paper if necessary):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Dated: \_\_\_\_\_

\_\_\_\_\_  
 Signature