

Important Information for My Loved Ones

ASSET LOCATION INFORMATION:

Name: _____

Birth Date: _____

Social Security Number: _____

Signed: _____



Church of the Nazarene Foundation
866/273-2549
www.NazareneFoundation.org
info@nazarenefoundation.org

I wish to share a few thoughts with you about my wishes regarding my final illness/death/burial:

You will likely need the counsel of an attorney. I would recommend _____

LOCATION OF IMPORTANT DOCUMENTS:

Will: _____

Birth Certificate: _____

Marriage Certificate: _____

Income Tax Records: _____

Military Records: _____

Naturalization/Citizenship Papers: _____

Insurance Papers: _____

Titles/Registrations: _____

Deeds: _____

Bank Box: _____ Key: _____

LIFE INSURANCE (Companies, policy numbers, and amounts):

REAL ESTATE (List properties, including cemetery lots):

SECURITIES:

Stockbroker: _____ Company: _____

Address: _____ Phone: _____

I have attached a list of stocks and bonds to this form. YES _____ NO _____

BANK ACCOUNTS:

Bank/Savings & Loan, etc.	Account Number	Type of Account
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_____	_____	_____
_____	_____	_____
_____	_____	_____

(For on-line accounts, be sure to state how to find the account, including password, etc.).

RETIREMENT BENEFITS (Pension plans /other benefits):

TAX-SHELTERED ACCOUNTS (TSA / IRA / KEOGH, etc.):

OTHER INVESTMENTS (C.D. / Bonds, etc.):

UNION MEMBERSHIP: YES ____ NO ____

Benefits I may have coming: _____

VETERANS BENEFITS (Including who to counsel with):

Service-connected disability: YES ____ NO ____

DEBTS OWED TO ME AS OF THIS DATE:

Description	Balance	Terms	Location of Documents

DEBTS I OWE (Long-term obligations):

Description	Balance	Terms	Location of Documents

OTHER INFORMATION:

PERSONS TO NOTIFY (Include name, address, phone numbers, email, etc.):

Date prepared: _____ Date revised: _____

For assistance with estate planning including information on Charitable Gift Annuities, Charitable Trusts, Donor-Advised Funds, Life Estate Agreements, etc., call the Foundation Office toll free at 866/273-2549 or email info@nazarenefoundation.org.