GOLDEN SHIELD LIFE INSURANCE

Final Wishes Planning Guide

A clear record of the choices and details that matter to you

Planning ahead can spare other people from guessing during a difficult time. Use this guide to record preferences, identify important documents, and explain who should be contacted.

PRIVATE FILLABLE RESOURCE - NOTHING IS SUBMITTED

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PREPARED FOR

DATE STARTED OR LAST UPDATED

HOW TO SAVE YOUR PRIVATE COPY

1. Download the PDF to your device before typing.
2. Open the downloaded copy in Adobe Acrobat, Apple Preview, or your browser's PDF viewer.
3. Complete only the sections you want. Then choose File > Save As, rename the file, and save it in a private folder.
4. Keep passwords, Social Security numbers, account numbers, and medical records out of this guide.

HOW TO PRINT WITH LESS INK

1. Select Black & White or Grayscale.
2. Choose Draft or Economy mode if your printer offers it.
3. Print double-sided and choose Flip on long edge.
4. Use Actual Size or 100%. Print only the pages you need. Skip page 1 if you do not need the cover.

Keep the completed guide where a trusted person can find it. Review it after major life changes.

This planning guide is not a substitute for legal documents. See page 2.

Start Here

Complete what is useful. Leave any section blank that does not apply to you.

IMPORTANT LEGAL INFORMATION

This guide records personal preferences. It is not a will, trust, power of attorney, advance directive, appointment of an agent, or contract for funeral services. A signature or notarization does not automatically make these wishes legally binding. Applicable law and properly executed legal documents control if there is a conflict.

Personal information

Full legal name

Preferred name

Date of birth

Phone number

Home address

Street, city, state, ZIP

Email address

Primary language

People who should know where this guide is kept

Primary contact name

Relationship

Phone

Email

Alternate contact name

Relationship

Phone

Email

Legal Documents and Key Decisions

Tell trusted people what exists and where it can be found. Do not place passwords or account numbers in this guide.

Documents I have completed

- [ ] Last will and testament
- [ ] Trust
- [ ] Financial power of attorney
- [ ] Health care power of attorney or health care proxy
- [ ] Advance directive or living will
- [ ] Organ and tissue donor registration
- [ ] Pre-need funeral contract or final expense funding arrangement

Where these documents are stored

Location and person who has access

Attorney or document preparer

Phone or email

People involved in decisions

Executor or personal representative

Phone or email

Health care agent

Phone or email

Person I want to coordinate arrangements

Phone or email

Organ and tissue donation wishes

Include registry status or limits

Care of My Body and Final Disposition

Mark all options you want considered, then explain your preference in the writing areas.

My current preference

- ☐ Burial
- ☐ Cremation
- ☐ Donation to science or education
- ☐ Natural or green burial
- ☐ Burial at sea
- ☐ Cryonic preservation
- ☐ No preference - I want the people responsible to decide
- ☐ Another preference

Explain your preferred disposition Location, cemetery, crematory, institution, or other details

Prearranged plan, provider, policy, or contract information Company, contact person, and location of documents

Transportation or transfer preferences

DO NOT LIST SENSITIVE NUMBERS HERE

Store policy numbers, account numbers, passwords, and copies of identification in a secure location. Use this guide only to tell trusted people where that secure information can be found.

Service, Memorial, or Celebration

Choose the format that best reflects your wishes. More than one option may apply.

Type of gathering

- ☐ Funeral service followed by burial or cremation
- ☐ Funeral service plus a graveside or crematory service
- ☐ Graveside or crematory service only
- ☐ Memorial service or celebration of life after disposition
- ☐ Service or gathering in a private home
- ☐ Private gathering for invited guests
- ☐ No formal service
- ☐ I want the people responsible to decide

Preferred place or provider — Funeral home, place of worship, venue, cemetery, or another location

Tone and atmosphere — Traditional, simple, informal, joyful, quiet, outdoors, or another preference

People I want involved in planning — Names and contact information

Accessibility, transportation, livestream, or special arrangements

Customs and Personal Traditions

These details can help others plan a service that feels personal and respectful.

Before and after the service

- ☐ Viewing
- ☐ Wake
- ☐ Visitation
- ☐ Reception or gathering afterward
- ☐ Religious, spiritual, cultural, military, or family rituals

Viewing, wake, visitation, or reception details

Religious, spiritual, cultural, or family customs

Include people or organizations to contact

Clothing, jewelry, hairstyle, or personal items

Include what should be returned to family

Flowers or alternatives to flowers

Colors, arrangements, or donation preference

Costs, Notices, and Service Recognition

Give practical guidance without placing private financial information in this document.

Budget and funding

Preferred spending level or budget range Economical, moderate, specific limit, or other guidance

Funding source or plan location General description only - do not include account numbers

People and organizations to notify

Family, friends, employers, clubs, groups, and organizations Include relationships, phone numbers, and email addresses

Public notices

Obituary information and where it should be published Websites, publications, facts, and achievements to include

Online announcement or social media instructions

Military or public service

Branch, agency, organization, honors, and requested traditions Include where service records are stored

Ceremony Details

Use this page for the people, music, readings, and details that would make the gathering meaningful.

Pallbearers or honorary pallbearers

Names and contact information

Person or people I would like to speak or give a eulogy

Names and what I hope they will share

Music

Songs, performers, recordings, or music to avoid

Readings, poems, prayers, quotations, or other spoken words

Photos, videos, artwork, keepsakes, or displays

Food, refreshments, or hospitality

Other details for the service or celebration

Resting Place and Legacy

Record practical instructions and the ways you would like to be remembered.

Casket, coffin, urn, or other container

Type, material, cost guidance, or pre-purchased item

Cemetery, burial site, mausoleum, niche, or scattering location

Include ownership details and where records are stored

Monument, marker, headstone, or memorial

Type, location, design, or pre-purchased arrangement

Epitaph or inscription

Message, dates, phrase, quotation, or image

Charities or causes for memorial donations

Names and websites or contact information

Legacy project, endowment, scholarship, tree, bench, or other memorial

People, Pets, Digital Life, and Final Messages

Add information that could otherwise be overlooked. Keep passwords and account numbers in a separate secure record.

Care of pets or animals

Names, routines, veterinarian, caregiver, and location of records

Digital accounts and online memorial preferences

Name a contact and state where secure access instructions are stored

Personal property with sentimental meaning

Describe wishes without attempting to replace a legally valid will

Messages to family, friends, or other people

Final notes and personal thoughts

REVIEW THIS GUIDE

Write the date of each review on the signature page. If your wishes change, update the guide and tell the people who have a copy. Consider destroying outdated copies to avoid confusion.

Statement and Signatures

Sign only after reviewing the completed guide. Witnesses are optional unless a qualified professional advises otherwise.

WHAT THIS SIGNATURE MEANS

I state that I completed or reviewed this guide voluntarily and that it reflects my preferences as of the date signed. I understand that this guide is informational and may not be legally binding. It does not replace a will, trust, power of attorney, advance directive, beneficiary designation, or funeral contract. If this guide conflicts with applicable law or a legally valid document, the law and legally valid document control.

PERSON COMPLETING THIS GUIDE

Signature _____ Date _____

Printed name _____ Most recent review date _____

OPTIONAL WITNESSES

Witness signatures confirm only that the witness observed the signing. They do not independently establish the legal effect of this guide.

Witness 1 signature _____ Date _____

Witness 1 printed name _____ Address _____

Witness 2 signature _____ Date _____

Witness 2 printed name _____ Address _____

Optional Notary Acknowledgment

Take the unsigned guide and valid identification to a commissioned notary. Sign only when the notary instructs you to do so.

NOTARIZATION HAS A LIMITED PURPOSE

A notary verifies identity and the act of signing. Notarization does not convert this planning guide into a will, trust, power of attorney, advance directive, or other legally binding directive. The notary should use or attach the certificate wording required by the state or jurisdiction where notarization occurs.

Acknowledgment

State or jurisdiction of _____

County of _____

This record was acknowledged before me on the date written below by the person named below, who appeared before me and acknowledged signing the Final Wishes Planning Guide voluntarily.

_____ _____

Date of acknowledgment | Name of signer

_____ _____

Notary public signature | Notary printed name

_____ _____

Commission number, if applicable | Commission expiration date

NOTARY SEAL

Place seal here if required

FOR THE NOTARY

Follow all identification, journal, certificate, seal, and recordkeeping requirements that apply. Attach a state-compliant certificate if this wording is not sufficient.