



READ THIS
WHEN I'M GONE...

MY FINAL WISHES JOURNAL

Please use this journal to record the information you feel will be helpful to those responsible for taking care of your funeral and other things when you've gone. But use it as a guide - only provide answers to those things that are relevant for you, and add in your own thoughts if anything in here prompts you to remember something else that's important (and attach your own pages where necessary).

It's wise to check and update this journal every year or two, and if you do change anything make sure you give a new copy to the appropriate people (see back page for checklist).

Date of this journal: _____

Full (legal) name: _____

Preferred name: _____

Maiden or any other name(s): _____

Address: _____

Phone number(s): _____

Email address(es): _____

Date and place of birth: _____

Marital/relationship status: _____

Full name of spouse/partner: _____

Details of children/legal dependants: _____

Details of grandchildren/great-grandchildren: _____

Date of marriage/civil union/de facto marriage relationship: _____

Name of ex-spouse(s) (if applicable): _____

Date of separation/divorce (if applicable): _____

List any known legal obligations (created by divorce or separation): _____

Parents, siblings names, dates of birth (and death if applicable), contact details:

Last or main occupation: _____

Pet details and instructions (if applicable): _____

MY REMEMBRANCE CHOICES

Details of where I'd like my funeral/wake/tangi/memorial service to be held:

Who I'd like to officiate or lead: _____

Who I'd like to speak: _____

Names of pallbearers: _____

Please include the following music/hymns: _____

Please include the following readings/prayers: _____

My preferred funeral director: _____

My clothing preferences for viewing/burial/cremation: _____

I'd like my body to be: Buried Cremated

Other (e.g. medical research): _____

Details of burial or memorial plot (if applicable): _____

My casket preference: _____

If people want to give something in remembrance, I'd prefer:

Flowers Donations

If flowers, type/colours: _____

If donations, to whom: _____

Other comments/instructions regarding my funeral/final arrangements:

DETAILS OF WILL AND KEY PEOPLE

Location of my Will: _____

Name(s) of my executor(s): _____

Details of current Powers of Attorney in operation: _____

Lawyer/solicitor: _____

Accountant: _____

Financial advisor: _____

Insurance advisor: _____

General Practitioner (doctor): _____

Other medical professional(s): _____

Details of key people to be contacted at the time of my death: _____

Details of life insurance, or any other policies that may include a death benefit:

KEY DOCUMENTS, ASSETS and LIABILITIES

Use these tables as a checklist of items that apply to you and include some key details about the item and where it's located.

Birth certificate
Marriage certificate
Driver's licence
Passport
Vehicle(s) ownership
House certificate of title
Insurance policies
Other property or assets
KiwiSaver, superannuation
Bank accounts credit & debit cards
Automatic payments

Stocks and Shares

Mortgages, loans, other debt (incl tax)

Other investments or cash

Valuables (jewellery, art etc)

Miscellaneous

Obituary space (add extra pages as needed) for notes of key points from my life:

Keep a current copy of this journal with your other important documents

It's a good idea to make sure key people listed have a copy too or know where to find this journal so they can easily locate documents and take care of things promptly. Record below anyone you will give a copy to:

Spouse/family member

Accountant

Executor(s) of Will

Insurance/financial advisor

Lawyer/solicitor

Other

Note, this document is general in nature and is intended to be a helpful guide. It is not a replacement for professional services or advice. If you have any doubts or questions in relation to services such as legal, accounting, insurance, financial, taxation, wills, bequests or any other matters that may affect you and your estate, please seek advice from the appropriate professionals.



We are happy to provide complimentary copies of this journal.

For additional copies, please get in touch with us at:

P O Box 21-010, Rototuna, Hamilton 3256

Freephone 0800 433 226

hello@febc.nz

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