

What Your Loved Ones Need to Know



By Rani Alferts Insurance Agency
Peace of Mind. Prepared.



www.ranialfertsagency.com

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INTRODUCTION

Final Planning is a Gift



Whether you're just getting started or updating your plans, documenting key details now can ease future stress and help your loved ones feel confident in honoring your wishes.

Think of this as a peace-of-mind file—a place to gather everything from insurance policies to passwords, so your family doesn't have to guess later.

You don't need to fill it all out today, and it doesn't need to be perfect. Just starting this process puts you ahead—and shows your family just how much you care.

Contact us: [972-661-5200](tel:972-661-5200)

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Final Planning Checklist

Life Insurance Details



Policy Provider:



Policy Number:



Benefit Amount:



Location of Policy Document:



Primary Beneficiary(ies):



Agent Name/Contact (if applicable):



Tip: Include a copy of your policy or keep it in a clearly marked folder your loved ones can easily access.

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Final Planning Checklist

Important Contacts



Primary Contact for Final Arrangements:



Attorney / Estate Planner:



Accountant / Financial Advisor:

Insurance Agent (Rani Alfes Agency): 972-661-5200

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Final Planning Checklist

Digital Access + Passwords



Phone PIN:



Email Login:




Online Banking Login:



Social Media / Cloud Storage Access:



Password Manager (Name + Master Password):

 Consider using a password manager and leaving your master password in a sealed envelope or with your attorney.

Final Planning Checklist

Financial Snapshot



Bank Accounts (Name + Where:



Credit Cards / Loans / Debts:



Retirement or Investment Accounts:



Property Ownership (Home, Land Vehicles:



Safe Deposit Box Location + Key:

Final Planning Checklist

Final Wishes



Preferred Funeral Home:



Burial / Cremation Preference:



Service / Celebration of Life Requests:



Obituary Notes (optional):



Other Instructions:



You can also include a letter to your family or a video message.
It's okay to be personal here.

Final Planning Checklist

Location of Key Documents

- ✓ Will or Living Trust
- ✓ Power of Attorney
- ✓ Medical Directives
- ✓ Insurance Policies
- ✓ Property Titles
- ✓ Marriage / Divorce Certificates
- ✓ Social Security Card
- ✓ Military Discharge Papers (if applicable)



Stored:

Why This Matters



Preparing this now allows your family to focus on what matters most—each other. You're saving them time, stress, and uncertainty in the middle of an already emotional moment.

And if you need help reviewing your current life insurance or updating a policy to reflect your family's needs—we're just a phone call or click away.


Get Help from the Experts

Need help reviewing your life insurance coverage or creating a custom plan? **Contact Rani Alfery Insurance Agency today.**

Call or Text: 972-661-5200

Visit Our Site to Start



 **Note:** This guide is intended to help you organize important information for your loved ones, but it does not replace legal or financial advice. For estate planning, wills, trusts, and other legal matters, we strongly recommend consulting with a qualified attorney or estate planning professional.

If you need a trusted referral, our team at **Rani Alferts Insurance Agency** is happy to connect you with local experts we know and trust.

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