

FAMILY RECORDS ORGANIZER

CONTAINS VALUABLE INFORMATION ON:

How to Make a Will

Veterans Benefits

Life Insurance

Social Security Benefits

Memorial Arrangements

Personal Assets & Liabilities



You've Made A Wise Decision.

The fact that you have purchased or are considering the purchase of memorial property in advance of need indicates that you have foresight. Making a property purchase ahead of time can be compared to having life insurance or preparing a will. You can make this important decision calmly and unhurriedly, without overspending. You can

obtain the type of cemetery property you prefer at substantial savings by planning ahead. And, above all, you will have the peace of mind knowing that you have spared your family from making this decision during a difficult time because everything has been taken care of in advance.

Your Memorial Property Will Look As Beautiful Tomorrow As It Does Today.

When you purchase your memorial property, you make a one-time contribution to Forest Lawn's Endowment Care Funds. It is your assurance of future care. The principal of these funds can never

be touched; only the income they earn can be used for the care and embellishment of property. So, the property you purchase at Forest Lawn will look beautiful for generations to come.

At Time Of Need, You Only Need To Make One Phone Call.

With one phone call to a Forest Lawn Mortuary, you can arrange to make all funeral plans at one time, with one understanding counselor. Mortuary, church, cemetery, crematory, mausoleum, and flower shop are all together, so the

funeral procession is conducted within the confines of our beautiful memorial-parks. You are sheltered from crowded city streets and the unpleasant stares of curious onlookers. Prices are lower, too, because everything is in one place.

Your Identification Card Ensures That Your Wishes Will Be Carried Out.

Your Forest Lawn Representative will be happy to provide you with a free identification card. Carry it with you at all times, so in case of an

emergency, all necessary arrangements may be made according to your wishes.

Prepare Your Family Records Organizer Today, And Spare Your Family Unnecessary Anguish Tomorrow.

Insurance statistics confirm that in 2 out of 3 cases, the widow is left behind to make the necessary funeral arrangements. Single parents are faced with the dilemma of having their children face this burden. All too often, the survivors face the uncertain question—"Would he or she have wanted it done this way?" This doubt can be eliminated by planning.

Now, you can make your memorial arrange-

ments in the privacy of your own home. By making your decisions today, while in good health and under normal circumstances, you have peace of mind knowing you have made the right choice, as well as eliminating the possibility of emotional overspending at time of sorrow. Furthermore, you will have spared those whom you love the ordeal of having to make these decisions.

The Benefits of Prearranging

Prearranging a funeral allows you to plan exactly what you want at your memorial service while still living. It gives you full control, as you can, without pressure, compare prices and select funeral services that are meaningful to you and your family.

Above all, prearranging is a thoughtful gift to the people you love the most. Prearranging spares others from having to make critical decisions at a very emotional and difficult time. Decisions such as: Do you prefer a traditional funeral or a less elaborate service? Burial or cremation? Where should the funeral be held? Who do you want to be there? What kind of casket or container? Open or closed casket? How would you like to pay for the service? What kind of memorial property? These are all important, yet personal, decisions that only you can make.

Therefore, we encourage you to prearrange as many details as you can. You can — and should— plan for the following components of a funeral service:

- Memorial property (buy in advance)
- Location of memorial service
- Casket selection
- Type of burial vault
- Bronze memorial tablet and inscription
- Flowers
- Clergy member or reader
- Music (recorded or live)
- Favorite passages from Bible or other literature
- Lodges or participating organizations
- Newspapers to notify for obituary
- Personal memorabilia to include as part of the memorial celebration
- Any other special wishes

When you prearrange a funeral, you also have the opportunity to create a service that reflects your personality and the things that are important to you. A funeral is a significant event—like a wedding, birthday or anniversary— and is a special time when family and friends gather to comfort each other, share memories and stories and celebrate a life lived. No two funerals, like no two people, are alike. So when planning your service, consider using photographs, favorite music, and special readings. You may also wish to invite your family members and friends to be part of the service.

Finally, prearranging makes good financial sense. When you figure out what kind of service you want, you can compare prices, and make an objective decision. There are a number of ways to pay for your memorial service—life insurance, savings account, funeral trust or a prepaid funeral plan. Consider all the alternatives and decide which is best for you.

We believe the best option is to plan a funeral with a reputable organization, and to fund the the plan with life insurance under a program which offers guaranteed price protection. Forest Lawn offers Forethought® funeral planning, which is funded through the purchase of whole life insurance from Forethought Life Insurance Company, Batesville, Indiana (for which Forest Lawn is a general agent). Your funeral plan will give you control in selecting from several complete funeral packages. Each package contains a generous casket discount. These funeral packages have been carefully designed to provide you with the kind of value, security and quality that has made Forest Lawn world famous. Or if you prefer, you can customize and create a service of your own. For more information, feel free to contact our Information Office at 800-204-3131, or visit our website at ForestLawn.com for up-to-date information.

Updating Your Family Records Organizer

It is very important to review and update your Family Records Organizer at least once a year. Any changes in your will, estate, insurance policies, and employment should be recorded to keep it current. By doing so, you will remove an addi-

tional burden from your family members when they refer to it at a future date. Finally, it is a good idea to let a family member or close friend know that you have this folder and where you keep it.

DOCUMENT LOCATIONS

Birth Certificate

Children's Birth Certificates

Marriage Certificate

Deeds and Titles

Mortgages and Notes

Last Will and Testament

Deed for Cemetery Property

Military Discharge Papers

Income Tax Records

Life Insurance Policies

Annuities

Other Documents

Safety Deposit Box Location

Location of Keys

LIFE INSURANCE POLICIES

<i>Company</i>	<i>Policy Number</i>	<i>Name of Insured</i>	<i>Beneficiary</i>

Each insurance company will require a certified copy of the Death Certificate. It is wise to make others aware of your insurance policies to assure that claims are made in the event of multiple deaths. Duplicate this section and give a copy to someone outside your home.

BANK ACCOUNTS

<i>Bank</i>	<i>Address</i>	<i>Account Number</i>	<i>Type of Account</i>

MUTUAL FUNDS

<i>Fund Name</i>	<i>Company</i>	<i>Address</i>	<i>Account Number</i>

PERSONAL ASSETS & LIABILITIES

(Photocopy this page and review yearly.)

Assets

Real Estate

Current Value

Primary Residence

Address

Secondary Residence

Address

Other Real Estate

Address

Address

Address

Cash

Securities

IRA's

Pensions

Trusts

Life Insurance

Notes Receivable

Business Interests

Name & Address

Name & Address

Annuity

Other

Total Value of Assets _____

Liabilities

Name of Lending Institution

Amount Owed

Mortgages

Personal Loans

Notes Payable

Investment Debts

Taxes

Other

Federal

State

Local

Total

Total Liabilities _____

ADVISORS TO NOTIFY

Attorney

Name _____

Address _____

Telephone _____

Accountant

Name _____

Address _____

Telephone _____

Family Doctor

Name _____

Address _____

Telephone _____

Executor/Executrix

Name _____

Address _____

Telephone _____

FAMILY AND FRIENDS TO NOTIFY

Name _____ Relationship _____

Address _____ Telephone _____

Name _____ Relationship _____

Address _____ Telephone _____

Name _____ Relationship _____

Address _____ Telephone _____

Name _____ Relationship _____

Address _____ Telephone _____

INFORMATION FOR NEWSPAPER NOTICE

Husband

Wife

My name as it should appear in the notice

My name as it should appear in the notice

Date of Birth

Date of Birth

Current Address (street, city, state & zip)

Current Address (street, city, state & zip)

Prior Residence (indicate city, state and number of years)

Prior Residence (indicate city, state and number of years)

Children

Children

Education (schools, degrees, years)

Education (schools, degrees, years)

Public Offices Held (city, state)

Public Offices Held (city, state)

Military Citations

Military Citations

Lodges, Clubs, Associations (indicate offices held)

Lodges, Clubs, Associations (indicate offices held)

Your Local Newspaper

Your Local Newspaper

VETERANS BENEFITS

Families of honorably discharged veterans of the United States armed forces may be eligible for certain funeral and burial benefits. They can include a large presentation flag, a basic burial allowance, transportation costs, and other additional state and local benefits.

If you have a Veterans Administration insurance policy, you can name any person, persons, company,

corporation, or legal entity as beneficiary or trustee. At your nearest Veterans Administration office, you can obtain the necessary form which allows you to name or update your beneficiary or trustee. Like all important insurance forms, you should annually review your policy to make any changes that may be necessary.

Forest Lawn Will Help With Your Claims Procedure

To file an insurance or burial claim, you should visit your nearest Veterans Administration office immediately after the veteran has deceased. However, for your convenience, Forest Lawn Mortuary will apply for any eligible veteran on your family's behalf if you bring the necessary papers at the time funeral arrangements are made. Whether you or Forest Lawn apply for benefits, you must provide the following:

- Discharge Papers
- Service Serial Number
- Marriage License

- Children's Birth Certificates
- Death Certificate

Claims require approximately 30 days to process, and payment can be made either in monthly installments or in one lump sum—whichever you choose. For more information, contact the Veterans Administration office in Los Angeles at (800) 827-1000 or consult the white pages of your phone book for the office nearest you.

SOCIAL SECURITY BENEFITS

A surviving spouse, entitled child, or in some cases, divorced wife, may be eligible for Social Security survivor's benefits. One such benefit available to a surviving spouse is a lump sum cash payment to help defray funeral costs.

To receive this or any other benefit, you must apply in person at any Social Security office. The address of the office nearest you is located in the front of the white pages in the phone book under United States Government, Social Security Administration.

When applying for benefits, you must produce the following:

- Social Security number
- Marriage License
- Proof of Marriage Termination (if applicable)
- Income record (W-2 forms) for previous two years
- Birth Certificates of deceased, surviving spouse, and children (under 22 years old for college students; otherwise 18)
- Death Certificate (6 or more copies may be needed)

Address and Phone Number of Nearest Social Security Office:

Name

Social Security Number

If you would like to receive a statement of earnings recorded in your Social Security account, fill in the coupon below and mail it to: Social Security Administration, P.O. Box 57, Baltimore, Maryland 21203

✂ Cut along the dotted line

Request for Social Security Statement of Earnings

Name _____ Social Security Number _____

Address _____

City, State, Zip _____

Date of Birth _____

Your Signature _____

Sign your name only. Under the law, Social Security information is confidential and anyone who signs someone else's name can be prosecuted.

YOU SHOULD HAVE A WILL

As part of your “estate plan,” you should have a will. You can purchase a fill-in-the-blanks will form (statutory will) from a book or stationary store that sells legal documents. In these forms, there are specific instructions as to how to complete the will form.

The statutory will has information designed to help you understand about wills and to decide if the statutory will meets your needs. It will tell you about designating who may receive your assets and who an executor is and what he or she can do for you. It will tell you that, if you have children under 18, you should designate a guardian to raise them. It will tell you that there are handwritten wills, typewritten wills, and attorney-prepared wills in addition to statutory wills. It will explain some of the reasons you may not want to use the statutory will.

As the statutory will form points out, you may write your own will. In doing so, you should write out by hand (not typed) the entire will, including date and signature.

The statutory will form points out that if you die without a will, what you own (your “assets”) in your name alone will be divided among your spouse, children or other relatives -according to state law and that the court will appoint a relative to collect and distribute your assets.

Even if you use a statutory will form or write your will by hand, you should have an attorney review it. Of course, you can have an attorney draft the will for you.

In addition to a will, you should have an overall “estate plan” since some property such as life insurance, retirement plans, joint tenancy property, living trusts, and community property are not covered by a will.

As part of your estate planning, you also can let your family know your life support preferences. To show these preferences, you can use a “Durable Power of Attorney for Health Care” or a “Directive to Physicians.”

FUNERAL ARRANGEMENTS CHECKLIST

These are some items you may wish to bring to Forest Lawn when making funeral arrangements.

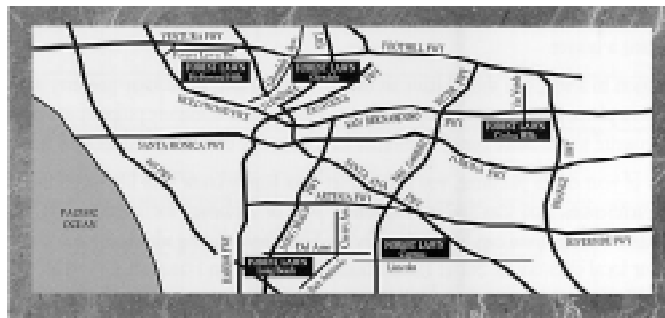
- Photograph that shows hairstyle
- Birth certificate
- Life insurance policies
- Before Need contracts
- Military discharge papers

You also may want to think about selecting the following:

- Minister, priest, pastor, rabbi
- Flower selections
- Music selections
- Scriptures or other readings
- Casket bearers
- Memorial tablet inscription

WHY DO PEOPLE CHOOSE FOREST LAWN BEFORE AND AT TIME OF NEED?

- **Everything in One Place** — Mortuary, cemetery, church, cremation, and flower shop are together. You are spared from spending hours on the phone talking with several different entities during an emotionally difficult time.
- **Reputation** - Serving Southern California since 1906, more families have chosen Forest Lawn than any other funeral establishment. You, like hundreds of thousands of others, can have full confidence and assurance that every detail of your memorial wishes will be carried out with care, dignity, and excellence.
- **Locally Owned and Managed** - We have been part of your community for over 90 years. Therefore, you can trust our staff of caring people to treat you with warmth and compassion when you need it most.
- **Quiet and Dignified Funeral Services** - At Forest Lawn, you have the comfort of a peaceful final tribute within a setting of towering trees and vistas of green lawn. You are not bothered by the noise and bustle of crowded city streets, nor do you have to sit in traffic during a long procession from the church to the cemetery.
- **Convenient Locations** - You can get to all five Forest Lawns quickly and easily from anywhere in Southern California.
- **Low Prices** - Sometimes the best actually costs less. Call Forest Lawn and ask for our price list, or visit us at ForestLawn.com. We'll send you a general price list that you can use to call other mortuaries and cemeteries to compare prices. We're confident that you'll discover just how affordable Forest Lawn's prices are, and that you really can have the best.
- **Protected Beauty** - Forest Lawn's exceptional Endowment Care Funds have been built to a high level, and as they continue to grow, you can have the peace of mind of knowing that the memorial you purchase today will look just as beautiful tomorrow and in the decades to come.



Forest Lawn® Memorial-Parks & Mortuaries

800-204-3131

Glendale F.E. 656
1712 S. Glendale Avenue
Glendale, CA 91205

Hollywood Hills F.E. 904
6300 Forest Lawn Drive
Los Angeles, CA 90068

Long Beach F.E. 1151
1500 E. San Antonio Drive
Long Beach, CA 90807-1233

Cypress F.E. 1051
4471 Lincoln Avenue
Cypress, CA 90630

Covina Hills F.E. 1150
21300 Via Verde
Covina, CA 91724