



Celebrate a Life



Planning Portfolio

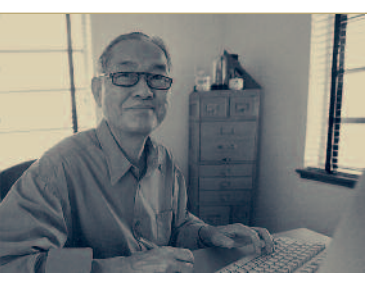
Planning Ahead

It's not always easy, especially when it comes to thinking about your own death.

But it's smart — for you and your loved ones. At Forest Lawn, we want to help make planning ahead easier. From gathering all your important papers together to capturing the most memorable details of your life to arranging your service and final resting

place in advance, it makes sense to take care of it now. After all, planning ahead today can spare your family difficult financial decisions during an emotional time. We've seen thousands of families benefit from this kind of foresight.

This is your starting point — your own Planning Portfolio. Start filling it in, and you'll find it's not only a way to help your family, it's a way to Celebrate a Life®. Your life.



CONTACT A FOREST
LAWN ADVANCE
PLANNER TODAY TO
MAKE SURE YOU
AND YOUR FAMILY
ARE PREPARED.
1-800-873-6777

A PLACE TO CELEBRATE

Established in 1906, Forest Lawn has grown to service Southern California through its locations in Glendale, Hollywood Hills, Cypress, Covina Hills, Long Beach, Cathedral City, Coachella, Indio, and Palm Springs. Since that time, Forest Lawn has committed itself to providing outstanding service and beautiful environments for family outings, remembering loved ones and commemorating holidays. Serving all faiths and cultures, our beautiful grounds are host to a wide range of celebrations and special events. At Forest Lawn, we recognize that to Celebrate a Life® is also about Celebrating Life's Meaningful Moments™.

PUTTING THE PLANNING PORTFOLIO TO GOOD USE

This Planning Portfolio is the first step in putting your plan together. Take the time to fill it out. Remembering the great things you've accomplished in your life is truly rewarding. Pulling together keepsakes and personal documents will remind you of all you've experienced. And knowing where those important items and documents are will make things that much easier for your family during a difficult time.

We also suggest using this piece as the starting point for a discussion with the people you love. It's important they know what you've already taken care of and where to find all the necessary information. Be sure to store this portfolio in a safety deposit box or another protected location. Please send the enclosed reminder cards we've included to loved ones, ensuring a friend or family member can find this information quickly when they need it.

Funeral planning is funded through the purchase of whole life insurance from National Guardian Life Insurance Company, Madison, WI (NGL). A qualified Forest Lawn® planner, who has been both licensed by the state and appointed as an agent of NGL, can answer any questions. Forest Lawn is an agent of NGL. National Guardian Life Insurance Company is not affiliated with The Guardian Life Insurance Company of America, aka The Guardian or Guardian Life. CA Insurance 0D08477

Celebrate a Life.®

Your Way. Who better to make decisions about your final arrangements than you?

MY PERSONAL HISTORY

Full Name _____

Date of Birth _____

Spouse/Partner _____

Children _____

Education _____

Profession _____

Military Service & Citations _____

Lodges, Clubs, Associations _____

Personal Accomplishments _____

PLANS I HAVE MADE

Cemetery _____

Address _____

Telephone _____

Plot Location _____

Contract No. _____

Advance Planning Policy # _____

Ceremony Location _____

SPIRITUALITY

Faith/Denomination _____

Place of Worship (Church, Temple, Mosque, etc.) _____

Address _____

Telephone _____

Contact _____

Favorite Quotations or Scripture _____

Favorite Songs or Hymns _____

MY LEGACY

My Fondest Memories _____

My Proudest Accomplishments _____

I Want my Friends & Family to Know _____

What I Would Like my Epitaph to Say _____

My Memorial Ceremony

By outlining your wishes you can determine exactly what you want celebrating your life to be like.

It's a great reason to think about how you want to be remembered and help your loved ones in the process. Planning a memorial when a death has just occurred is

stressful. Too many of us spend time worrying and fretting about what the person would want, thinking, "What if I'm doing this wrong?" "I wish I knew if this is

what they would want." And having to deal with the conflicting opinions of family members. This is your chance to ease those fears and reduce anxiety.

MY MEMORIAL CEREMONY

I Want to be Remembered For _____

Music _____

Readings _____

Clergy _____

My Pre-Recorded Message to my Loved Ones is Located _____

The Photos I Would Like to Use Are Located _____

I Want to be Buried in the Following Clothes & Jewelry _____

Other Items to be Buried With _____

I Want my Ashes Scattered at _____

The Business Side of My Life

Getting it all in order now will help everyone later.

The following section puts all the business and financial information your loved ones will need to settle

your estate in one place. Fill this out in as much detail as possible to ensure they have the information

they need to streamline the process and make informed decisions when necessary.

PERSONAL DOCUMENTS

You Can Find My:

Here:

Birth Certificate

Marriage Certificate

Last Will & Testament

Cemetery Deed

Advance Planning Policy

Military Discharge Papers

Income Tax Records

Living Trust

Power of Attorney

Safety Deposit Box

Safety Deposit Box Keys

Other: _____

FINANCES

All of the financial institutions listed below will need to be contacted immediately. Be sure to ask what documentation they will need to ensure your loved ones know what they should take care of.

BANKING

Bank Name _____

Address _____

Telephone _____

Account No. _____

Checking Savings Money Market CD Other: _____

Account No. _____

Checking Savings Money Market CD Other: _____

Account No. _____

Checking Savings Money Market CD Other: _____

Bank Name _____
 Address _____
 Telephone _____
 Account No. _____
 Checking Savings Money Market CD Other: _____

Account No. _____
 Checking Savings Money Market CD Other: _____
 Account No. _____
 Checking Savings Money Market CD Other: _____

Bank Name _____
 Address _____
 Telephone _____
 Account No. _____
 Checking Savings Money Market CD Other: _____

Account No. _____
 Checking Savings Money Market CD Other: _____
 Account No. _____
 Checking Savings Money Market CD Other: _____

SAFETY DEPOSIT BOX

Bank Name _____
 Address _____
 Telephone _____
 Box No. _____

Bank Name _____
 Address _____
 Telephone _____
 Box No. _____

INSURANCE

Life Insurance Company _____
 Telephone _____

Policy No. _____
 Beneficiary _____

Medical Insurance Company _____
 Telephone _____

Record No. _____

Home Owners Insurance Company _____
 Telephone _____

Policy No. _____
 Property(ies) _____

Long-Term Care Insurance Company _____

Policy No. _____

Telephone _____

INVESTMENTS—MUTUAL FUNDS

Fund Name _____

Fund Name _____

Address _____

Address _____

Telephone _____

Telephone _____

Account No. _____

Account No. _____

Fund Name _____

Fund Name _____

Address _____

Address _____

Telephone _____

Telephone _____

Account No. _____

Account No. _____

INVESTMENTS—STOCKS

Brokerage _____

Broker _____

Address _____

Telephone _____

Account No. _____

Stocks Held _____

Location of Certificates: _____

INVESTMENTS—IRAS

Company _____

Address _____

Telephone _____

Account No. _____

Beneficiary _____

INVESTMENTS—TRUSTS

Fund Name _____

Address _____

Telephone _____

Account No. _____

Beneficiary _____

INVESTMENTS—ANNUITIES

Fund Name _____

Address _____

Telephone _____

Account No. _____

Beneficiary _____

PROPERTY—PRIMARY RESIDENCE

Property Address _____

Lender _____

Address _____

Telephone _____

Loan No. _____

PROPERTY—SECOND RESIDENCE

Property Address _____

Lender _____

Address _____

Telephone _____

Loan No. _____

PROPERTY—INVESTMENTS

Property Address _____

Lender _____

Address _____

Telephone _____

Loan No. _____

Property Address _____

Lender _____

Address _____

Telephone _____

Loan No. _____

Property Address _____

Lender _____

Address _____

Telephone _____

Loan No. _____

PENSION—COMPANY

Company _____

Address _____

Telephone _____

Account No. _____

Beneficiary _____

Location of Documentation _____

PENSION—SOCIAL SECURITY

SSN _____

Beneficiary (if applicable) _____

Location of Documentation _____

PERSONAL LOANS—LENDER

Borrower _____

Address _____

Telephone _____

Amount of Loan _____

Rate _____

Term of Loan _____

Location of Documentation _____

Borrower _____

Address _____

Telephone _____

Amount of Loan _____

Rate _____

Term of Loan _____

Location of Documentation _____

PERSONAL LOANS—BORROWER

Lender _____

Address _____

Telephone _____

Amount of Loan _____

Rate _____

Term of Loan _____

Location of Documentation _____

BUSINESS INTERESTS

Company Name _____

Address _____

Telephone _____

Key Contacts _____

Nature of Relationship _____

Company Name _____

Address _____

Telephone _____

Key Contacts _____

Nature of Relationship _____

PROFESSIONAL RESOURCES

List all of the people you want notified of your death. Be sure to update phone numbers regularly.

Attorney _____ Telephone _____

Accountant _____ Telephone _____

Doctor _____ Telephone _____

Doctor _____ Telephone _____

Doctor _____ Telephone _____

Executor _____ Telephone _____

Insurance Agent _____ Telephone _____

Insurance Agent _____ Telephone _____

Insurance Agent _____ Telephone _____

Dept. of Motor Vehicles _____ Telephone _____

Social Security Administration _____ Telephone _____

Veterans Administration _____ Telephone _____

PROFESSIONAL CONTACTS

Employer _____ Telephone _____

Supervisor _____ Telephone _____

Other _____ Telephone _____

_____ Telephone _____

_____ Telephone _____

PERSONAL CONTACTS

Family _____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

_____ Telephone _____

Friends _____ Telephone _____

_____ Telephone _____

_____ Telephone _____

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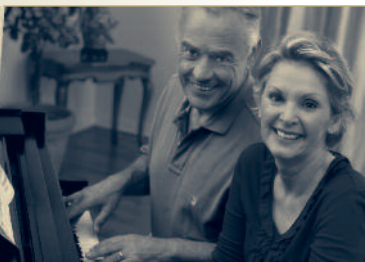
_____ Telephone _____

What Needs to be Taken Care of

There's no need to worry that you'll forget what to do.

There's a lot to do when someone you love passes away. Just take things one step at a time. Start with the contacts you've already listed. There's no need to hurry, but try to make the calls as soon as you feel ready. The following are some key things to think about.

- ___ Notify family & friends
- ___ Contact Forest Lawn & find out what arrangements have been made and will be needed
- ___ Call financial institutions & insurance companies
- ___ Determine how many death certificates will be needed (banks with joint accounts, life insurance, etc.)
- ___ Write obituary for newspaper
- ___ Establish who will serve as casket bearers and make request
- ___ Select clothing/jewelry
- ___ If no advance plan has been made, select music, scripture, location and time of service
- ___ Identify people giving eulogies.
- ___ Arrange gratuity for officiant or minister
- ___ Make memorial service/reception arrangements



YOUR LOVED ONES
WILL THANK YOU

Throughout our lives, planning ahead has never been easy. But, it's almost always worthwhile. By filling out this Planning Portfolio and by making advanced arrangements with Forest Lawn, you will save your family, friends and loved ones many stressful decisions. At Forest Lawn, it is our hope that by helping you make these plans, we're helping you and yours Celebrate a Life[®]. Your life.