

What My Family Should Know

A GUIDE FOR GETTING YOUR AFFAIRS IN ORDER

Name:	Melvin Greene
Date Completed:	

Foreword

We cannot stress too often the importance of getting your personal affairs in order. This process is important for everyone, but even more important for those who often find themselves living away from family and friends. Throughout your life, you have tried to protect your loved ones and now you have a chance to help them at a time when they will need that help the most. Taking the time to plan now and record information for your loved ones will be the most unselfish gifts of love you can give.

What My Family Should Know

Although many of us are efficient in our daily lives and keep meticulous records in our professions, most of us leave inadequate and incomplete records of our economic and personal affairs when we die.

When and how your benefits will be paid and how your estate will be settled are many questions that must be answered. This guide has been compiled to help you record the necessary facts for your family, your attorney and your executor.

We suggest you complete this record and store it in a safe place so it will be available for possible revisions by you and later use by your family. It is not recommended that you keep this guide in your safety deposit box since most are sealed after death.

PERSONAL INFORMATION

Name:	Melvin Albert Greene, Jr.				
Social Security No.	212-60-6299				
Date of Birth:	August 6, 1952	Place of Birth:	Baltimore, Maryland		
Current Home Address:	8104 Willowgate Place				
Home Telephone #:	Work Telephone #: Retired	Supervisor's Telephone #:			
Prior or Permanent Address:					
Marital Status:	Married:	Divorced:	Widowed:	Single:	Separated:
Date and Place of Marriage:	June 18, 2011 College Park, Maryland				
Name of Spouse:	Voncille Greene				
(Please complete if different than above)					
Current Home Address:	Same				
Telephone #:	Same				
Spouse's Employer:	Retired				
Address of Employer:					
Work Telephone #:					
Registry of Children:					
Given Name	Date of Birth	Place of Birth	SSN	Address	

PERSONAL INFORMATION - SPOUSE

Name:					
Social Security No.					
Date of Birth:		Place of Birth:			
Current Home Address:					
Home Telephone #:	Work Telephone #: Work location:	Manager's Name/Phone #			
Prior or Permanent Address:					
Marital Status:	Married:	Divorced:	Widowed:	Single:	Separated:
Date and Place of Marriage:					
Name of Spouse:					
Spouse's Employer:					
Address of Employer:					
Work Telephone #:					
Registry of Children:					
Given Name	Date of Birth	Place of Birth	SSN	Address	

Grandchildren				
Name	Date of Birth	Place of Birth	SSN	Their Parents

FAMILY REGISTRY

Husband's Family			
Name of Father:		SSN:	
Current Home Address:			
Telephone #:			
Work Telephone #:			
Name of Mother:		SSN:	
Current Home Address:			
Telephone #:			
Work Telephone #:			
Registry of Brothers and Sisters			
Given Name	Date of Birth	Place of Birth	Address
Wife's Family			
Name of Father:		SSN:	
Address			
Name of Mother:		SSN:	
Address			
Registry of Brothers and Sisters			
Given Name	Date of Birth	Place of Birth	Address

If any of the above family members are deceased, please indicate date of death next to the name.

**IN CASE OF EMERGENCY
THESE PEOPLE MUST BE NOTIFIED**

Name:	
Address:	
Home Phone:	Work Phone
Name:	Relationship
Address:	
Home Phone:	Mobile Phone
Name:	
Address:	
Home Phone	Mobile Phone
Name:	Relationship
Address:	
Home Phone:	Mobile Phone

**IMPORTANT BUSINESS AND PERSONAL CONTACTS
TO BE NOTIFIED**

Name of Supervisor:			
Office Phone:		Mobile Phone:	
Name of Spouse's Supervisor:			
Office Phone:		Mobile Phone:	
Personal Physician:			
Address:			
Office Phone:	Home Phone:		
Personal Physician:			
Address:			
Office Phone:	Home Phone:		
Clergy:			
Address:			
Office Phone:	Home Phone:		
Attorney:	None		
Address:			
Office Phone:	Home Phone:		
Dentist:			
Address:			
Office Phone:	Home Phone:		
Accountant:			
Address:			
Office Phone:	Home Phone:		
Insurance Agent:	Insurance Agency:		
Address:			
Office Phone:			
Broker:			
Investment Co.			
Address:			
Office Phone:			

PERSONAL FINANCE INFORMATION

Bank:			
Checking Account No.:		Is Account Joint?	
Primary Savings Account No.:		Is Account Joint?	
Holiday Club Savings Account No.:		Is Account Joint?	
Bank:			
Checking Account No.:		Is Account Joint?	
Savings Account No.:		Is Account Joint?	
Checking Account No.:		Is Account Joint?	
Savings Account No.:		Is Account Joint?	
Bank:			
Checking Account No.:		Is Account Joint?	
Savings Account No.:		Is Account Joint?	
Bank:			
Checking Account No.:		Is Account Joint?	
Savings Account No.:		Is Account Joint?	
Bank:			
Checking Account No.:		Is Account Joint?	
Savings Account No.:		Is Account Joint?	
Certificate of Deposit #:	None	Bank:	
Certificate is kept at:			
Safety Deposit Box #:	None	Bank:	
Address of Bank/Branch:			
Safe Deposit Box is accessible by:			
Key is kept at:			
Investment/Stock Portfolio is located at:			
Bonds Portfolio is located at:			

IRA Certificate and file are located at:			
401K Retirement File is located at:			
Credit Card Accounts:			
Name:	Account Number:		
Issued by:	Is Account Balance Insured?		
Name:	Account Number:		
Issued by:	Is Account Balance Insured?		

REAL ESTATE

We own the property located at:				
Mortgages on the property are held by:				
Address:				
1 st Deed of Trust Monthly Payments:	Balance of Loan:			
2 nd Deed of Trust Monthly Payments:	Balance of Loan:			
Value of Property:				
Homeowners Insurance Held by:				
Homeowners Insurance Policy is located at:				
Mortgage Insurance if any:				
Mortgage Insurance Policy located at:				
I/We own other real estate at: (List addresses and same info as above):				
Deeds, tax documents and pay records are located at:				
AUTOMOBILE AND AUTO INSURANCE				
Make	Model	Year	Registered To	Status of Ownership

A SUMMARY OF MY EMPLOYEE BENEFITS

Health Insurance	
I have Self Only	Or Family
This is a federal plan	YES:
I/We have additional coverage under my spouse's health plan	YES:
That plan type is	And is prov
Life Insurance (1)	
I have Life Insurance in the amount of \$	
Agent's name:	Company
I have a designation of beneficiary on file:	YES:
The beneficiary named is:	
He/She is aware of this designation:	YES:
Life Insurance (2)	
I have Spouse Service Member Group Life Insurance in the amount of \$	
with	Company
I have a designation of beneficiary on file:	YES:
The beneficiary named is: Clifton G. Hoffler	
He is aware of this designation:	YES:
I am enrolled in other employee sponsored supplemental insurance plans:	Yes:
Plan Names:	
Leaves Balances/Leave Programs:	
As of:	Hours of an
I am a member of a Medical Leave Sharing Program:	Yes:
The beneficiary names is:	
He/She is aware of this designation:	Yes:
Investment Plans:	
I am a member of Employee Pension Plan	Yes:
I have a designation of beneficiary on file:	Yes:
The beneficiary named is:	
He is aware of this designation:	Yes:
I am a member of another employee investment plan	Yes:
I have a designation of beneficiary on file:	Yes:
The beneficiary named is:	
He/She is aware of this designation:	Yes:

RETIREMENT

I am a federal employee	Yes:	No:
If federal employee, I am under the:		
Civil Service Retirement System (CSRS)		
Federal Employees Retirement System (FERS)		
Other		
I am eligible for retirement as of:		
Due to prior military service or federal service, I have been advised that I may need to pay either a deposit or a re-deposit to fully receive credit for that service. Yes: No:		
Have deposits/re-deposits been paid?	Yes:	No:
If my death occurs before retirement, my spouse is aware that he/she may be eligible for a survivor annuity. Yes: No:		
Amount: \$	Per month. Restrictions/Limitations:	
Social Security:		
If I am a federal employee under FERS, is my spouse aware he/she and the children may qualify for benefits under Social Security. Yes: No:		
Additional Benefits Information:		

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FINAL WISHES

Name:			
Church Preference:	Religious Affiliation:		
Clergy:	Phone:		
Funeral Home Preference:			
Address:			
Phone:			
I have a Pre-Paid Burial Plan:	YES	NO:	
I would prefer to have funeral services held at:			
Funeral Home	Name of Funeral Home:		
Church:	Name of Church:	Address: Phone #:	
I prefer:	Internment	Entombment	Cremation
My choice of cemetery is:			
I have not purchased a lot.	I have purchased a lot.		
The lot is in the name of:			
Location of deed for lot:			
I would like to have the following persons act as pallbearers:			
Home-going service Officiant:			
Would you want an obituary published?	YES:	NO:	
Please list the following in my obituary:			
I am entitled to Veterans Benefits:	YES:	NO:	

I am entitled to Military Honors:	YES:	NO:	
Musical Selections or Scripture Readings:			
Special Requests for Service:			

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Name:			
Church Preference:	Religious Affiliation:		
Clergy:	Phone:		
Funeral Home Preference:			
Address:			
Phone:			
I have a Pre-Paid Burial Plan:		NO:	
I would prefer to have funeral services held at:			
Funeral Home	Name of Funeral Home:		
Church:	Name of Church:	Address: Phone #:	
I prefer:	Internment	Entombment	Cremation
My choice of cemetery is:			
I have not purchased a lot.	I have purchased a lot.		
The lot is in the name of:			
Location of deed for lot:			
I would like to have the following persons act as pallbearers:			
If cremated, what do you wish done with your ashes?			
Would you want an obituary published?	YES:	NO:	
Please list the following in my obituary:			

I am entitled to Veterans Benefits:	YES:	NO:	
I am entitled to Military Honors:	YES:	NO:	
Musical Selections or Scripture Readings:			
Special Requests for Service:			

TRUSTS AND POWERS OF ATTORNEY

An attorney can best advise you if you need to execute a Will. While it is possible to do Wills using various software packages, it is not advisable to do so without having it reviewed by an attorney. Even coping and old Will could be a problem, if you have changed your home of record or have any changes in your family or your assets. You should also rely on your attorney to advise you regarding a power of attorney. While many can be done without the use of an attorney, again the money is well spent if it ensures you and your family that your affairs are in order.

I have a Will that is located at:	
The attorney who handled my Will is:	
At the Law Firm of:	
Phone Number:	
My last Will is dated:	
The Executor is:	
Legal Guardianship Documents are located at:	

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At the Law Firm of:	
Phone Number:	
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The Executor is:	
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TRUST FUNDS

You may wish to seek the advice of your attorney and investment counselor to determine if establishing a Trust Fund would be beneficial. There are many types of Trust Funds for various purposes and each must be done by an attorney. Just remember that if you are setting up a trust fund and want your employee benefits to be paid into the trust, than you must update your beneficiary forms to reflect this.

LIVING WILL OR HEALTH CARE POWER OF ATTORNEY

Individuals may also wish to execute a Living Will or Health Care Power of Attorney that instructs family members and physicians what steps they may want taken should they become unable to make health care decisions for themselves. Since copies of these documents may not be accepted by a physician, you should ensure that signed originals should be given to your private physician, your family members and possibly your attorney.

I have NOT executed a “living Will”	I have executed a “living Will”
My “living Will” is located at:	

I have NOT executed a “living Will”	I have executed a “living Will”
My “living Will” is located at:	

ORGAN DONATION (Name)

I DO NOT want any of my organs donated.	
I would like to donate ANY organs needed for transplant.	
I would like to donate only the following organs for transplant/research:	
I would like to donate my body for research.	

ORGAN DONATION (Name)

I DO NOT want any of my organs donated.	
I would like to donate ANY organs needed for transplant.	
I would like to donate only the following organs for transplant/research:	
I would like to donate my body for research.	

