

# Personal Legacy & Funeral Plan



**MACDONALD  
WEALTH**

**FOR:** .....

**DATE:** .....

*This is an important document it should be completed and kept in a safe place known to your family.*



# Personal Legacy & Funeral Plan

## Personal Information

Surname: .....  
Given names: .....  
Date of birth: .....  
Place of birth: .....  
Religion: .....  
Primary Occupation: .....

## Family Details

Parent / Carer one surname:.....  
Parent / Carer one Given names: .....  
Date of Birth: .....  
Birthplace: .....  
Usual occupation: .....  
  
Parent/Carer two surname: .....  
Parent/Carer two Given names: .....  
Date of Birth: .....  
Birthplace: .....  
Usual occupation: .....

Spouse / partner surname: .....  
Spouse / partner Given names: .....  
Date of Birth: .....  
Birthplace: .....  
Usual occupation: .....

## Marriage Details

☐ Married ☐ Single ☐ Separated  
☐ Widowed ☐ Divorced ☐ De facto

### First Marriage

Date: .....  
Age: .....  
Where: .....  
Name of Spouse: .....  
Separated / Widowed / Divorced: ☐ Yes ☐ No  
Date: .....

### Second Marriage

Date: .....  
Age: .....  
Where: .....  
Name of Spouse: .....  
Separated / Widowed / Divorced: ☐ Yes ☐ No  
Date: .....

### Defacto

Name: .....  
Date: .....

## Children's details

List children including legally adopted, deceased or if no children.

Number of children: .....

### Child #1

Name: .....

Date of Birth: .....

### Child #2

Name: .....

Date of Birth: .....

### Child #3

Name: .....

Date of Birth: .....

### Child #4

Name: .....

Date of Birth: .....

### Child #5

Name: .....

Date of Birth: .....

### Dependant #1

Name: .....

Date of Birth: .....

### Dependant #2

Name: .....

Date of Birth: .....

### Dependant #3

Name: .....

Date of Birth: .....

### Dependant #4

Name: .....

Date of Birth: .....

## Primary next of Kin

Surname: .....

Given name: .....

Address: .....

City: .....

Postcode: .....

Phone: .....

Email : .....

Relationship: .....

## Family Doctor

Name: .....

Phone: .....

Address: .....

City: .....

Postcode: .....

## Medical History

Date and details of major illnesses, chronic health conditions (such as diabetes or heart disease), and hospitalisations.

Date: .....

Details: .....

Date: .....

Details: .....

Date: .....

Details: .....

Date: .....

Details: .....

Date: .....

Details: .....

Date: .....

Details: .....

## Personal Documentation

### Birth Certificate

Location: .....

### Marriage Certificate

Location: .....

### Spouse death certificate (if applicable)

Location: .....

### Passport

Name on Passport: .....

Location: .....

Number on passport: .....

Expiry: .....

### Driver License

Name on License: .....

Location: .....

License Number: .....

Expiry: .....

## Financial Information

### Tax information

IRD Number: .....

Location of records: .....

### Life Insurance policies

Name of Company: .....

Policy Number/s: .....

.....

Location of records: .....

Details: .....

### Bank account details

Name of Bank: .....

Name of account: .....

Location of records: .....

Name of Bank: .....

Name of account: .....

Location of records: .....

Name of Bank: .....

Name of account: .....

Location of records: .....

Name of Bank: .....

Name of account: .....

Location of records: .....

### Property details

Address/es: .....

Location of records: .....

### Credit Card details

Name of Credit card: .....

Name of bank: .....

Location of records: .....

### Car details

Type of Car: .....

Registration number: .....

Ownership details: .....

Location of records / insurance / lender / registration details:

.....

.....

### Investments

Details: .....

Location of records: .....

Details: .....

Location of records: .....

Details: .....

Location of records: .....

### Superannuation

KiwiSaver provider: .....

Account number: .....

Location of records: .....

Details: .....

#### Other Superannuation provider

Account number: .....

Location of records: .....

Details: .....

#### Mortgage details

Lender: .....

Account number: .....

Location of records: .....

### Your achievements

#### Career achievements

Date: .....

Location: .....

Details: .....

Date: .....

Location: .....

Details: .....

Date: .....

Location: .....

Details: .....

#### Personal achievements

Date: .....

Location: .....

Details: .....

Date: .....

Location: .....

Details: .....

### Funeral Planning

#### Person I would like to make arrangement

Surname: .....

Given name: .....

Address: .....

City: .....

Postcode: .....

Phone: .....

Email: .....

Relationship: .....

#### Funeral Director

Name: .....

Phone: .....

Address: .....

City: .....

#### Prepaid funeral

Company: .....

Phone: .....

Details: .....

#### Funeral Insurance

Company: .....

Phone: .....

Details: .....

#### It is my wish to be

☐ Buried ☐ Cremated

#### Follow a service held at

☐ Chapel ☐ Crematorium ☐ Funeral Directors

☐ Other

Details: .....

#### I would like the service to be led by a

Clergy: .....

Religion: .....

Details: .....

Celebrant: .....

Details: .....

## Appearance

☐ Coffin ☐ Casket

Details: .....

Jewellery: .....

Glasses: .....

Clothes: .....

Special items: .....

## Floral Appearance

1. ....

2. ....

3. ....

## Music

Entry : .....

Reflection: .....

Farewell: .....

## Favourite Poem

Details: .....

.....

## Favourite Reading

Details: .....

.....

## Donation in lieu of flowers to

Any special requests: .....

## Photos and plaques

Preferred Photo for Display: .....

Favourite Photo for order of service: .....

Other requests: .....

.....

## Think of Those left behind

Standard Industry funerals can be expensive, costing from **\$4,000** for a basic cremation to around **\$15,000** for a more elaborate funeral.

## Costs typically involve

Funeral director fees, transport coffin, death certificate, permits, burial or cremation, cemetery plot, other expenses include celebrant or clergy, flowers, newspaper notices and the wake.

The financial burden of funeral expenses can often add another level of grief to what is typically a troubled time.

If you want to protect your family from your funeral costs, there are ways to prepare in advance, these can be through savings, funeral insurance, prepaid funeral plans or KiwiSaver / Investments.

## Will Details

### Executor of my will

Name: .....

Phone: .....

Address: .....

City: .....

Postcode: .....

### Executor of my will (Joint)

Name: .....

Phone: .....

Address: .....

City: .....

Postcode: .....

### Copy of my will

Date of will: .....

Deposited with: .....

Name: .....

Phone: .....

Address: .....

City: .....

Postcode: .....

Location of documents: .....

### Solicitor

Name: .....

Phone: .....

Address: .....

City: .....

Postcode: .....

## Get your paperwork in order

It is a little known fact that nearly 47%\* (Retirement commission) of New Zealanders don't have a will.

This means when you die your assets end up being distributed by legal means and, sometimes, to relatives you are no longer in contact with.

It is vital that everyone make a will so your friends and family can attend to your last wishes as you had intended.

We recommend working with your solicitor to ensure that your will is in place and reviewed when you have significant life events or every five years or so.

Here are some useful steps to help getting that process moving if you don't have a will.

Choose Wisely, the executor and witnesses should be chosen wisely, your executor will arrange your funeral and has to ensure your wishes are carried out in regards to your will.

## Start talking

Your friends and family need to know what your last wishes are, so don't be shy in seeking their input and talking to them about what you want. It's also a good idea to let them know who the executor of your will is so they can contact them easily. Tell a close friend, family member or your financial adviser where a copy of your will is in the event it needs to be accessed.

## Children

If your children are under 18, think about who you would appoint as their guardian and how you might provide for them.

## Disinheriting

If you do not want any of your assets to be given to certain people, it is best to leave a details statement of wishes for your executor.

## Be Specific

Don't be scared to be specific to include as much detail as possible about the people set to inherit from your will. Include their full name, date of birth and their relationship to you.

## Change it up

Writing your will does not cement it in stone, you are free to change it as much or as little as you like. It's best to keep it regularly updated with the details of your wishes.

## Things to include in a eulogy

- When and where your loved one was born
- Nicknames and/or names known to others
- Childhood
- Parents names – where they met and married
- Brothers and sister
- Early childhood – locations, interests and stories
- Schools attended, awards gained
- Some interesting stories about childhood days
- Academic or trade qualifications and achievements
- Details of any military or public service
- Family
- Details of marriages, divorces, children, significant relationships
- Details of grandchildren/great grand children
- Stories to treasure from family
- Career highlights
- Details of any club memberships, positions held
- Details of sporting achievements
- Personal stories
- Details of historical significance
- Details of any hobbies or interests, travel
- Details of activities, music, theatre, fishing, golf, etc.
- Any special stories, sayings qualities that are significant to others
- Special reading, music or poetry to be included.





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