CITYGATE
FINANCIAL PLANNING

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PLANNING AHEAD

Get your affairs in order

Funeral & farewell wishes

Would you prefer to be buried, cremated, or have another type of farewell (e.g., natural burial, donation to science)?

Do you have a specific location where you'd like your ashes or remains to rest or be scattered?

What kind of funeral or memorial service would you want (if any)?

Who would you want to speak, perform, or be involved?

Are there specific songs, readings, or rituals that feel meaningful to you?

Do you have preferences about organ donation?

How would you like your life to be remembered or celebrated?

Is there a specific funeral director you would like to use?

Financial & legal matters

Do you have a will or estate plan in place?

- If so, where is it stored and who knows how to access it?
- When was this last updated?
- Are there items you own that you would like to go to specific people you haven't detailed within your will?

Do you have life insurance or death-in-service benefits that others should know about?

Where are the policy documents stored?

Are the policies written into trust? If so, where is the trust form?

List out bank accounts, investments, pensions, or debts that someone will need to locate or manage.

Digital life

Does someone know how to access your phone, computer, and online accounts?

◯ Yes ◯ No

If no, how would they access it?

Have you documented your passwords?

◯ Yes ◯ No

If so, where are they documented?

Are there social media profiles or online presences you'd like deleted, memorialised, or managed?

Do you have important digital files, writings, or photos you'd like preserved or shared?

Personal messages & relationships

Is there anything unsaid you'd want particular people to know?

Would you like to leave letters, videos, or messages for loved ones?

- ◯ Yes
- ◯ No

Are there family stories, values, or lessons you'd like to pass on?

- ◯ Yes
- ◯ No

Who would you want to take care of your pets, if you have any?

Who should be notified if you die, and how would they be contacted?

Knowledge & practical information

What things do you know how to do that others might struggle with after you're gone (e.g., handling family finances, home maintenance, traditions)?

Do you have any documents, passwords, or contact lists that only exist in your head?

Are there key people (accountant, lawyer, financial adviser, GP, etc.) others should be able to reach?

Legacy & meaning

How would you like to be remembered — in your family, work, community?

What do you hope people will learn from your life?

Are there any causes or passions you'd want continued in your name?

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