SHARING YOUR FINAL WISHES

UNDERSTANDING WILLS AND FINAL ARRANGEMENTS

INCLUDES:

PERSONAL INFORMATION
THINGS TO CONSIDER
FAMILY CHECKLIST
FINAL ARRANGEMENTS
ONLINE INFORMATION

TRANSAMERICA®

Insurance / Investments / Retirement





WILLS AND FINAL ARRANGEMENTS

When you think about it, creating a will and making final arrangements are one more opportunity to show you care. You've lived life on your own terms, why shouldn't you leave a legacy on your terms?

If you die without a will, you are said to have died "intestate." Intestacy means state law will determine what happens to the property and assets you leave behind.

Your will is your opportunity to distribute your assets as you desire, whether that's gifts to charity, a comfortable retirement for your spouse, or a head start for children, grandchildren, and others who have been important to you.

FINAL ARRANGEMENTS: REDUCE THE BURDEN FOR A GRIEVING FAMILY

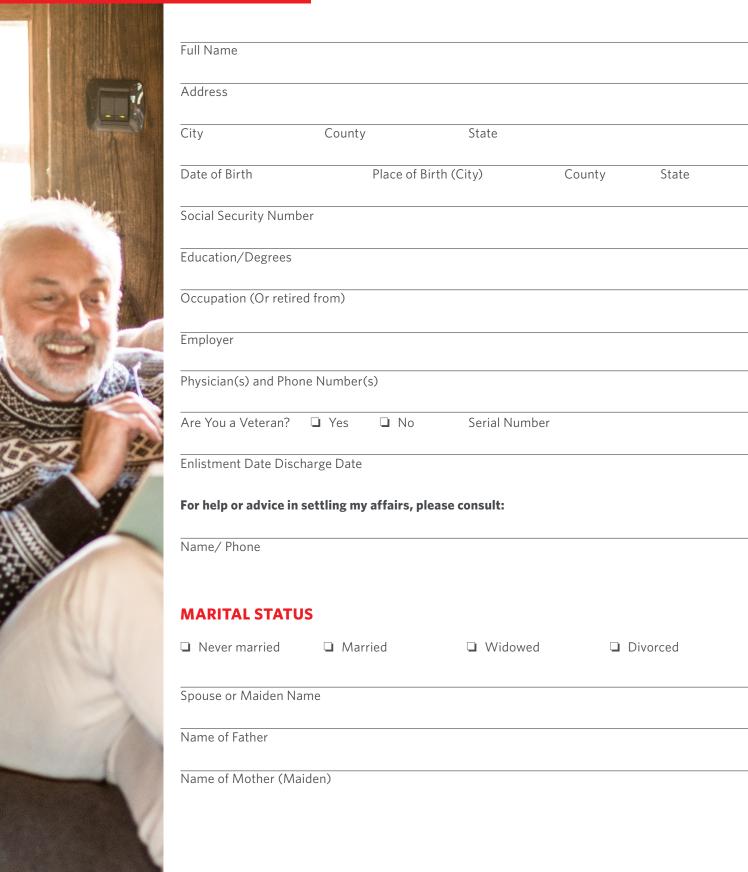
Documenting your wishes and final arrangements, often through something called a "letter of last instructions," can be one less burden for your family members as they are dealing with their grief. Putting everything in order before you pass on can help ensure your wishes are followed and leave less guesswork for those you leave behind. Including some vital information about yourself — your date of birth, hometown, occupation, degrees earned, etc. — can help your loved ones or funeral home write your obituary or death notice. You may want to discuss with your legal counsel where to store your letter of last instructions. Storing such information in a safe deposit box could be problematic if relatives are unable to access it immediately after your death.



You may want to consult a professional, such as an attorney, when creating your letter of last instruction and will.

We've provided a checklist you can fill out before taking a formal step with topics to help you get organized and thinking about what's important to you.

PERSONAL INFORMATION



FINAL ARRANGEMENTS | TRANSAMERICA

THINGS TO CONSIDER FOR A WILL

☐ Husband/Wife	■ Son/Daughter	■ Relative	Attorney	■ None
- Huspallu/ Wile	■ 3011/ Daugnter	- Relative	- Attorney	□ None
Name				
What instructions do	you have for real estate	holdings?		
What personal effect	s do you wish to give an	d to whom?		
		T \\\(\(\text{\exit\exit\exit\exit\exit\exit\exit\exit		
Item		To Whom		
Item		To Whom		
Item		To Whom		
Item		To Whom		
□ Will, Living Will, Po□ Insurance Policies	ower of Attorney, Letter o	of Instructions		
☐ Pension, Annuity, 4	101(k), IRA, Other Retire	ment Accounts		
☐ Bank and Credit Ca	ard Information			
☐ Tax Records				
■ Mortgage Information	tion			
■ Social Security Car	d, Birth Certificate, Marr	iage Certificate, Divord	ce Judgement, etc.	
☐ Vehicle Titles				
■ Location of Valuab	les (And Access Informa	tion)		
	tion			

FAMILY CHECKLIST

☐ Veteran's Organization

BEFORE THE FUNERAL ...

NOTIFY:		

NOTIFY:	
Ę	☐ Attorney
Ę	■ Business Associates
Ę	☐ Cemetery
- [☐ Florist
- [☐ Fraternal Organizations
- [☐ Friends
- [☐ Funeral Director
- [☐ Minister/Church
- [☐ Obituary
- [☐ Organist/Soloist
- [■ Relatives
AFTER THE FU	JNERAL
NOTIFY:	☐ Accountant
- [☐ Financial Institutions
- [☐ County Recorder
_	
Ļ _	☐ Credit Cards
Ĺ	■ Department of Motor Vehicles
- [☐ Insurance Agents and Companies
Ę	☐ Medicare
-	☐ Military Pension
Ę	☐ Post Office
- [☐ Social Security
- [☐ Union
_	☐ Utility Companies

FINAL ARRANGEMENTS | TRANSAMERICA

FINAL ARRANGEMENTS

Name of Funeral Home			
Name of Church			
Name of Cemetery			
Burial or Cremation			
buriar or cremation			
Casket or Urn Preference			
Di al Clathin n	I L	Other Instructions	
Burial Clothing	Jewelry	Other Instructions	
Reserved Facilities, Plots, or Preneed	Contract?		
If Yes, Provide Details, Contact			
Special Readings, Music, Songs			
Special Ceremonies (military, fratern	al order, etc.)		
Pallbearers			
railbearers			
Inscription			
Send Donations To			
Special Instructions			
•			



ONLINE INFORMATION

DEPARTMENT OF VETERANS AFFAIRS

va.gov

SOCIAL SECURITY ADMINISTRATION

ssa.gov

CREMATION ASSOCIATION OF NORTH AMERICA (CANA)

cremationassociation.org

INTERNATIONAL CEMETERY, CREMATION AND FUNERAL ASSOCIATION

iccfa.org

THE NATIONAL FUNERAL DIRECTORS ASSOCIATION

nfda.org

MEDICARE

medicare.gov

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

hhs.gov

Transamerica Resources, Inc. is an Aegon company and is affiliated with various companies which include, but are not limited to, insurance companies and broker dealers. Transamerica Resources, Inc. does not offer insurance products or securities. The information provided is for educational purposes only and should not be construed as legal, tax guidance. Please consult your personal independent advisors for answers to your specific questions..

12/19