FORM INSTRUCTIONS

THE LEGACY Journey BY DAVE RAMSEY

EXECUTIVE SUMMARY

Your Legacy Box has everything your family will need. Make sure they know how to use it.

The executive summary form should be the first thing your family sees when they open this box after you're gone. Use this form to write any last-minute instructions or clarifications. Then list the contact information for your team of professionals.

FUNERAL INSTRUCTIONS

Preplan everything. Just don't prepay for anything.

The days after your death may be the most stressful period of your family's life. Don't add to that stress by leaving them in the dark about your funeral wishes. Go ahead and outline exactly what you want, where you want to be buried, what kind of service you'd like, etc. Just don't prepay for any of it; the rate of return on that investment is just the inflation rate between now and then, and you can do better in other investments.

SAFE DEPOSIT LOG

You want to protect your documents and valuables, not hide them.

A safe deposit box is a great way to keep your precious documents, records and valuables safe. But if your loved ones don't know what's in the box, you could leave them in an even more stressful, panicked state after you're gone. Use this form to keep a current breakdown of everything you've locked away for safety, and be sure to include the location of the key and the name and address of the bank.

PASSWORDS AND COMBINATIONS

Your legacy is well-protected. Make sure your loved ones will always have access.

Online passwords have become incredibly important in recent years, and it's important to protect your sensitive data by using unique, impossible-to-guess passwords for every login. Use this form to list your passwords for every website, financial institution, and online account that you use. You can also list any physical safe or lock combinations here, such as a fireproof safe that you keep in your home or office or even your gym locker.

RENTAL PROPERTY SUMMARY

You've worked hard to build wealth. Now be sure to keep your house(s) in order.

Rental real estate is a fantastic investment, but it is much more complicated to manage than retirement accounts and mutual funds. Use this form to record the relevant information your loved ones will need to follow up with your real estate investments after you're gone. You should also leave clear instructions for your family about what you want them to do with your properties. A time of grief can be the worst possible time for someone to become a reluctant landlord, so make sure you're on the same page with your heirs.

EXECUTIVE SUMMARY

WHAT TO DO

WHO TO CALL		
	NAME	PHONE
Life Insurance		
Lawyer		
Executor		
Bank		
Accountant/Tax Professional		
Estate Planner		
Mutual Fund Broker		
Retirement Account Broker		
College Fund Broker		
Funeral Home		
ID Theft Protection		
Auto Insurance		
Homeowner's Insurance		
Umbrella Liability Insurance		
Health Insurance		
Long-Term Disability Insurance		
Rental Property Manager		
Real Estate Agent/Advisor		
Doctor 1		
Doctor 2		
Doctor 3		
Other		
Other		
Other		

FUNERAL INSTRUCTIONS

NAME	

FUNERAL HOME		BURIAL LOCATION	
Name		Name	
Phone		Phone	
Address		Address	

INSTRUCTIONS FOR REMAINS			
☐ Open Casket ☐ Cremation ☐ Closed Casket ☐ Other		If Other, Specify	
Casket/Urn Name		Burial Clothes	
Model Number			

PRESIDING MINISTER		OTHER SPEAKERS	
Name		Name	
Phone		Name	
Address		Name	

MUSIC SELECTIONS	FAVORITE SCRIPTURE

NOTES

FUNERAL INSTRUCTIONS

NAME	

FUNERAL HOME		BURIAL LOCATION	
Name		Name	
Phone		Phone	
Address		Address	

INSTRUCTIONS FOR REMAINS			
☐ Open Casket ☐ Cremation ☐ Closed Casket ☐ Other		If Other, Specify	
Casket/Urn Name		Burial Clothes	
Model Number			

PRESIDING MINISTER		OTHER SPEAKERS	
Name		Name	
Phone		Name	
Address		Name	

MUSIC SELECTIONS	FAVORITE SCRIPTURE

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SAFE DEPOSIT LOG

SAFE DEPOSIT BOX/SAFE LOCATION	ADDRESS	KEY LOCATION/SAFE COMBINATION	INSTRUCTIONS FOR ACCESS

ITEM	DATE ADDED TO BOX	DATE REMOVED FROM BOX	NOTES

PASSWORDS AND COMBINATIONS

ITEM *(website, bank, safe, email, account, etc.)*	**USERNAME**	**PASSWORD/COMBINATION**	**URL/LOCATION**

RENTAL PROPERTY SUMMARY

PROPERTY 1			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	

PROPERTY 2			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	

PROPERTY 3			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	

PROPERTY 4			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	

PROPERTY 5			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	

PROPERTY 6			
Name *(as appears on deed)*			
Address		**Lease Location**	
Current Value		**Mgmt Company**	
Tenant Name		**Real Estate Agent**	
Tenant Phone		**Agent Phone**	