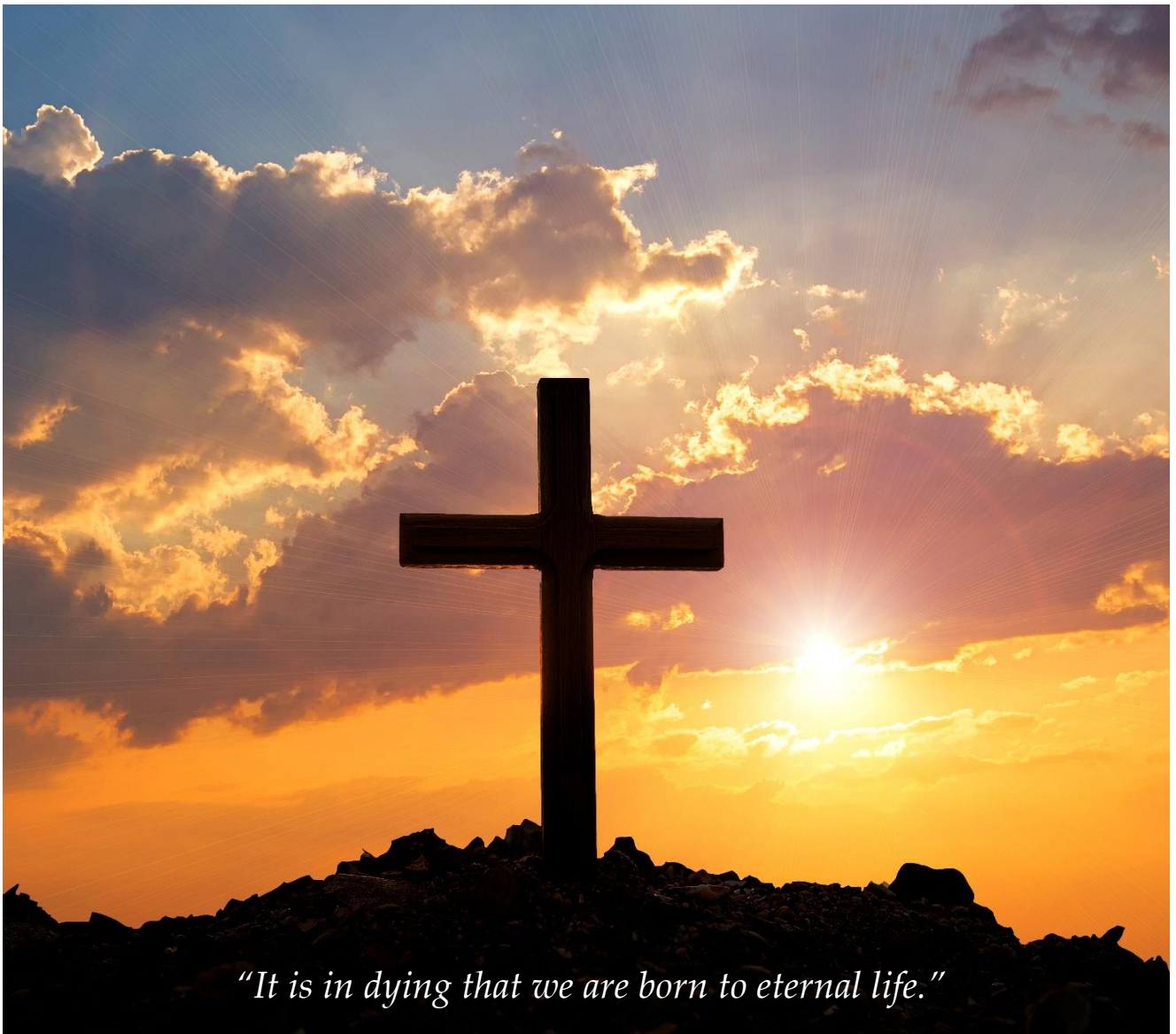


Catholic Funeral and Financial Planning Guide

FOR THE BENEFIT OF MY LOVED ONES



"It is in dying that we are born to eternal life."

A Note to My Loved Ones

I have created this record to provide my family with information they will need after my death. I have included here my own name and address. It includes financial and personal information that will be needed to settle certain affairs, as well as preferences and suggestions for arrangements that must be made. I hope this record will help make a difficult time easier for my family.

Name (first, middle, last)

Address

City

State/Zip

Phone

Email

Birth Date (mm/dd/yyyy)

Signature

Date

Where I keep this information on file:

Church/Parish: _____

Cemetery: _____

Lawyer: _____

Home: _____

Family: _____

Other: _____

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How to Use this Planning Guide

Planning your funeral and your end-of- life decisions shouldn't be frightening or difficult. Just picking up this guide is a start to planning; you can make the simplest plans, or you can plan each detail. It's all up to you. We encourage you to use this guide as a tool and a gift, and we encourage you to share this as a gift to your friends and family. You choose!

Keeping it Up to Date

Keeping this record up to date will provide your loved ones with accurate answers to many questions they will face at what could be the most difficult time of their lives.

The death of a loved one can be one of the most distressing and emotional occurrences that a person can experience. When a loved one dies, there are many important decisions that must be made, documents that must be quickly located, and numerous people who must be notified. Often, these decisions are made without guidance and under extreme duress from grief and confusion. The Catholic Foundation of the Diocese of Jackson has created this book to provide focus and guidance; a central location for family members to record personal information, convey personal desires and wishes, and identify the location of any important documents that will be needed when there is a death in the family.

How to Use this Guide

Following the death of a loved one, you may have many questions as to what should be done, and where to start. This booklet is designed to help assist you during this time. Information provided by your loved one within these pages should give you the direction and guidance you need. Should you need further assistance, please feel free to contact St. James, Tupelo, MS or Rebecca Harris, Stewardship and Development Director for the Diocese of Jackson at 601-960-8477.

Following a Death

Meet with your funeral director to finalize arrangements. He or she will assist you in completing the details of arrangements and filing the obituary notice.

Give times and place of service(s), calling hours and information regarding memorial donations and flowers. If you publish the date of the funeral, make sure someone is at the residence during the service as burglars often read the obituaries.

If the deceased lived alone: Make sure the residence is closed and secure and notify the landlord; transfer valuables and important documents to a safe place; contact utility companies to discontinue service; arrange for the forwarding of mail.

Contact the attorney who prepared the Living Trust or Will and obtain instructions. It is recommended that you schedule a meeting with your attorney so that he or she can guide you regarding the legal details following your loved one's death.

Arrange to have any appreciated assets valued.

Obtain certified copies of the death certificate from the funeral home. Consider the extent of your loved one's assets in deciding how many original certificates you require. Some institutions do not accept copies, so it may be wise to err on the side of ordering more than you think you may need.

Assemble important papers such as the Living Trust, bank books, stock certificates, real estate deeds, insurances policies, etc.

Distribute personal effects in accordance with the letter of last instruction. Provide each insurance company with a state of claim and a death certificate.

Contact the Social Security Office for benefits information. Benefits vary according to the number and ages of children and the age of surviving spouse.

continued...

Following a Death *continued...*

If the deceased was a veteran, an application should be made for the benefits from the US Department of Veterans Affairs.

Contact the deceased's employer, and, if applicable, union or professional organizations.

Current installment loan, service contracts, and credit card bills should be gathered. If credit cards were in joint names, remove the deceased's name from the credit cards. If the cards were in the deceased's name alone, cancel the cards. Some may be covered by credit life insurance. Similarly, check to see if the deceased had a mortgage insurance policy, which repays the outstanding mortgage upon the death of the policyholder.

Locate evidence of indebtedness due by the estate. Examine all check books, tax returns, and other financial reports for this purpose.

Make a list of any claims against the estate. Contact your attorney if any of the claims are disputed.

Change the title of the deceased's assets to co-trustee, successor trustee or successor beneficiary as applicable. An attorney should be used to transfer titles of real estate.

Contact your accountant to prepare the estate's tax returns. State and federal income tax returns must be filed and taxes paid. Income taxes are not excusable by death. A surviving spouse may still file a joint return for the year of death of the deceased spouse.

Catholic Funeral Rites Explained

The funeral rites, based on the practice of Christian Rome, evoke the soul's passage from this life to the next: "The funeral liturgy mirrored the journey of human life, the Christian pilgrimage to the heavenly Jerusalem" (Order of Christian Funerals, no. 42). Along the funeral pilgrimage, there are three "stations" or stops: (1) the Vigil (wake) and its related rites and prayers; (2) the Funeral Liturgy: preferably the Funeral Mass or, if this is not possible, the Funeral Liturgy Outside of Mass; and (3) the Rite of Committal. Each of these rites emphasizes a particular dimension of the Church's prayer for the deceased.

The Order of Catholic Funeral Rites

Prayers after Death

These prayers, offered at the time of death or shortly thereafter, are led by a priest, deacon, or other minister of the Church. This rite usually takes place in a hospital, nursing home, hospice facility, or home of the deceased. Alternatively, these prayers can be recited at the parish church when the family comes to make funeral arrangements for the deceased.

Prayer in the Presence of the Body

These prayers are usually recited either privately or at the funeral home before the viewing of the body.

Vigil (Wake)

"The vigil for the deceased is the principal rite celebrated by the Christian community following death and before the funeral liturgy, or if there is no funeral liturgy, before the rite of committal" (Order of Christian Funerals, no. 54). Therefore, while devotions such as praying the Rosary are commendable, they do not possess the same value or efficacy as the Vigil (wake), which is the official prayer of the Church. Two options are provided for the Vigil: (1) a Liturgy of the Word, or (2) some form of the Office of the Dead from the Liturgy of the Hours. The Vigil usually takes place the evening before the Funeral Liturgy, either in the funeral home or church.

Funeral Mass

The Church encourages the celebration of a Funeral Mass for the deceased. All Catholics are entitled to a Funeral Mass, which should not be denied them even though family members and friends may not themselves be Catholic. The Funeral Mass should generally be celebrated in the parish church of the deceased.

Funeral Liturgy outside Mass

If, for some reason, it is not possible to celebrate a Funeral Mass, the Funeral Liturgy outside of Mass should be used. This rite may be celebrated in a funeral home chapel or in a church. When the Funeral Liturgy outside Mass is used, a Mass for the deceased should be scheduled after the funeral, at a date and time convenient for the family.

Burial

The burial (Rite of Committal) takes place at the cemetery, where the body is interred in sacred ground or in an above-ground burial space (mausoleum).

Step 1 Before Death

It is best to accomplish these tasks while still of able mind and body.

- Plan a meeting with your parish priest so he can administer the sacraments to the dying family member and answer any questions the family may have about death and the church's funeral rites.
- Discuss your dying family member's wishes, taking into consideration what is best for him or her. Honoring the wishes the dying is outlined in this planning guide.
- Make any arrangements you can before the death of your loved one, including planning the funeral rites and selecting cemetery property.

Step 2 At Time of Death

- Call the parish priest to offer prayer and to comfort and consult the family in preparing for funeral rites. At the parish, a priest or parish representative will help you choose readings and responses and offer music selections, if they have not been pre-selected.
- Contact a funeral home. It is important to not hand over all the responsibility for the Vigil, Funeral and Burial to the funeral director alone. Consult with your priest. After major decisions have taken place by the family with the priest, the funeral director can confirm all the plans.
 - + At the funeral home you will plan for the Vigil (if not at the church) and viewings.
 - + You will select a burial casket or urn.
 - + You may also provide information to the funeral director for the death certificate. This includes all vital statistical information including the deceased's social security number, life insurance information, veteran's benefits, etc.
 - + Order flowers and arrange transportation for the services.
 - + Provide information for death notice or obituary in the newspaper.
- Cemeteries — if your loved one has not pre-purchased their committal space (grave, crypt, or niche) you need to select a burial location based on the type of committal (full body or cremation). In some cases, you will also need to select an outer burial vault (standard or protective). You will also select and review any memorialization (marker, headstone, plaque, lettering, etc.) you would like to include on your loved one's burial location. Memorialization can be selected at a later time. At the cemetery you will also confirm the committal service dates and times.

Step 3 After Death

Grief doesn't end with the funeral rites and can have lasting effects on individuals. Individuals grieve in different times, spaces, and manners. Many parishes offer resources to help loved ones deal with grief after the death of someone — including, but not limited to: consolation of grief workshops, prayer services, Masses, events (Memorial Day, All Souls' Day, Dia de Los Muertos, etc.).

Cemetery Committal - Full-Body Burial

CASKET

- METAL
- WOOD
- FIBERGLASS

EXTERIOR COLORING

INTERIOR COLORING/MATERIAL

BURIAL LOCATION

- ABOVE-GROUND
- CRYPT IN-GROUND GRAVE

INSCRIPTION & SYMBOLS

BODY PREPARATION

- EMBALMING
- NO EMBALMING

VIGIL

- OPEN CASKET
- CLOSED CASKET
- ROSARY
- NO VIGIL
- FAMILY ONLY

FLAG

- YES
- NO

(During the Catholic Funeral Liturgy the casket is typically draped with a pall.)

CLOTHING

- NEW CLOTHING
- FROM MY WAR DROBE

PREFERENCES:

JEWELRY & GLASSES

- REMAIN ON
 - RETURN TO:
-
-

OTHER PERSONAL ITEMS:

ORGAN/BODY DONATION

- YES, I HAVE AGREED TO DONATE MY BODY
-

PLEASE CONTACT

ADDRESS

CITY/STATE/ZIP

PHONE/EMAIL

Pre-Existing Cemetery Arrangements

Name of Cemetery		
Address	City	State/Zip
Listed Owner of Property	Phone/email	
Section Name	Row	
Grave, Crypt or Niche #		
Name of Funeral Home		
Address	City	State/Zip
Please Contact		
Phone/Email		

Additional Notes

Cremation

Cremation may be a confusing issue for Catholics. At one time, the Church prohibited cremation, but this is no longer the case. The Church continues to prefer and encourage the faithful to bury or entomb the bodies of their departed loved ones. However, if cremation is chosen for worthy motives, the Church wishes to support the faithful in honoring the life, faith and memory of the departed.

We have provided some answers to the most commonly asked questions that we hope this will be helpful in making your decision. If you need further information, please contact us or your parish.

When did it become allowable for Catholics to be cremated?

In 1963, the Catholic Church lifted its prohibition forbidding Catholics to choose cremation. Canon 1176 of the 1983 Code of Canon Law states, "The Church earnestly recommends the pious custom of burying the bodies of the dead be observed, it does not, however, forbid cremation unless it has been chosen for reasons which are contrary to Christian teaching."

When should cremation take place?

The Church prefers that cremation take place after the full Funeral Liturgy wherein the body is present. The Church's belief in the sacredness of life and the resurrection of the dead encourages us to celebrate the Funeral Liturgy with the body present while affirming the value of human life. If it is not possible for the body to be present at the Funeral Mass, the Catholic Church has granted permission for the celebration of the Funeral Mass with the cremated remains of the body present in the church. Since it is the "earthly" remains and not the body of the deceased that is present, there are slight adaptations in the liturgy.

How are the cremated remains of the body laid to rest?

The cremated remains of the body should be buried or entombed. Scattering the cremated remains of the body, keeping them at home, or dividing them among various family members is not the reverent disposition the Church requires.

What Catholic rites are available for those choosing cremation?

The Order of Christian Funerals presents the Church's plan for the celebration of the death of one of the faithful. These rites assume the presence of the body, but adaptations are available for those choosing cremation. Contact a parish or a priest to prepare for the Order of Christian Funerals.

The Order of Christian Funerals consists of three parts: Vigil; the Funeral Liturgy; and the Rite of Committal. The "Rite of Committal" is our farewell to our beloved brother or sister in Christ. At this time we turn over the care of our loved one to the cemetery staff, as we await the resurrection of the dead along with the communion of saints.

Cemetery Committal Cremation

BURIAL LOCATION

- ABOVE-GROUND NICHE
- IN-GROUND GRAVE
- OTHER* _____

URN TYPE

- DECORATIVE
- METAL
- PLASTIC
- CERAMIC

INSCRIPTION & SYMBOLS

VIGIL

- ROSARY
- NO VIGIL
- FAMILY ONLY

Additional Notes/Preferences

Funeral Planning

- I would like my family to decide with a priest at time of death
- I would like to offer suggestions for my service (see below)
- I would like to plan my funeral (see below)

Type of Funeral

- Vigil, followed by morning Mass and burial
- Vigil, Funeral Mass, Cremation, and burial at later date/time Funeral
- Mass, Cremation, and burial at later date/time
- Cremation, Memorial Mass, and burial
- Memorial Service, no Mass, burial
- Graveside service only, no church services
- Other: _____

Service Proceedings

- Traditional: Lead by priest, deacon or other Catholic minister
- Veteran: Color guard, gun salute, service flags, taps
- Other: Lead by family or funeral director

Notes/Questions: _____

Location of Services

Name of Church

Address

City

State/Zip

Please Contact (Priest or Deacon)

Phone/Email

Name of Funeral Home

Address

City

State/Zip

Please Contact

Phone/Email

Vigil

Scripture Readings

1st Reading: _____ Read by: _____

2nd Reading: _____ Read by: _____

Other Favorite Prayers or Poems to be read before or after the Vigil:

Eulogy (done outside of the Vigil and funeral rites)

Read by: _____

Read by: _____

Music

Live Pre-Recorded No Preference

If Live, name and phone numbers of preferred musicians, groups, singers:

Music Selections:

Flower Preferences (Color & Type)

Additional Personalization

Slideshow Photo Display

Notes/Questions:

Funeral Mass

Scripture Readings

1st Reading: _____ Read by: _____

Responsorial Psalm Read Sung is preferred

Read/Sung by: _____

2nd Reading: _____ Read by: _____

Gospel: _____

Prayer of the Faithful

Read by: _____

Presentation of Gifts: _____

Music

Live Pre-Recorded No Preference

If Live, name and phone numbers of preferred musicians, groups, singers:

Music Selections:

Flower Preferences (Fresh, Color & Type)

Reception

Venue

Address _____ City _____ State/Zip _____

Please Contact _____ Phone/Email _____

Catering Yes No No Preference

Catering provided by _____ Address _____ Phone _____

Additional Personalization Slideshow Photo Display

Service & Memorial

People to Include

Priest or Deacon

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Pallbearers/Ushers

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Lectors

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Musician/Cantor

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Organizations/Other

Name	Phone/Email
------	-------------

Name	Phone/Email
------	-------------

Obituary

Publications

Local Town or Community Newspaper

Online

Other

Please include:

- | | | |
|---|---|---|
| <input type="checkbox"/> Picture | <input type="checkbox"/> College degrees | <input type="checkbox"/> Outstanding work |
| <input type="checkbox"/> Place of birth | <input type="checkbox"/> Military service | <input type="checkbox"/> List of survivors |
| <input type="checkbox"/> Cause of death | <input type="checkbox"/> Memberships held | <input type="checkbox"/> List of family preceded in death |

Additional Notes

Please list hobbies, personal achievements, favorite memories, unique character traits, or other personal information you would like to have mentioned in your obituary.

FINANCIAL PLANNING GUIDE

Personal | Marriage | Children

Personal Information

Name (first, middle, last, please include maiden if applicable)

Address

City

State/Zip

Birth Date (mm/dd/yyyy)

Birthplace City

State/Zip

Location of Birth Certificate

Father's Full Name

Father's Birthplace

Mother's Full Name

Mother's Birthplace

Baptism

Name of Church

Address

City

State/Zip

Baptism Date (mm/dd/yyyy)

Location of Baptismal Certificate

Marriage

Name of Spouse (first, middle, last, please include maiden if applicable)

Date and Place of Marriage

Location of Marriage Certificate

Personal | Marriage | Children *continued...*

Children and Grandchildren

Child's Name	Birth Date (mm/dd/yyyy)
--------------	-------------------------

Address	Email/Phone
---------	-------------

Child's Name	Birth Date (mm/dd/yyyy)
--------------	-------------------------

Address	Email/Phone
---------	-------------

Child's Name	Birth Date (mm/dd/yyyy)
--------------	-------------------------

Address	Email/Phone
---------	-------------

Child's Name	Birth Date (mm/dd/yyyy)
--------------	-------------------------

Address	Email/Phone
---------	-------------

Child's Name	Birth Date (mm/dd/yyyy)
--------------	-------------------------

Address	Email/Phone
---------	-------------

Grand Child's Name	Birth Date (mm/dd/yyyy)
--------------------	-------------------------

Address	Email/Phone
---------	-------------

Grand Child's Name	Birth Date (mm/dd/yyyy)
--------------------	-------------------------

Address	Email/Phone
---------	-------------

Relatives | Friends

Relatives

Name	Relationship
Address	Email/Phone
Name	Relationship
Address	Email/Phone

Friends

Name	Email/Phone
Name	Email/Phone
Name	Email/Phone

Guardian – *Protect your children by appointing a legal guardian*

If you have minor children, you need to name a guardian for them in your will. The person in charge of the finances for the children’s benefit would normally be a trustee named in your will. The trustee may or may not be the same individual as the guardian.

Name	Relationship
Address	Email/Phone

Education | Work | Service

Schools Attended

Name/Location	From/To	Degree
Name/Location	From/To	Degree
Name/Location	From/To	Degree
Location of Diplomas		

Work History

Company Name	Position	How Long
Company Name	Position	How Long
Company Name	Position	How Long

Military Service

Position	How Long	
Branch of Service	Rank	Serial #
Enlistment Date	Discharge Date	
Location of Discharge Papers		
Citations, Recognitions, and Awards		

Clubs & Organizations

Name	From/To	Position
Name	From/To	Position
Name	From/To	Position

Medical

I have been treated for

- Cancer (briefly describe) _____
- Heart Disorder (briefly describe) _____
- Kidney Disorder (briefly describe) _____
- Circulatory Disorder (briefly describe) _____
- Diabetes _____
- Tuberculosis _____
- Other (briefly describe) _____
- Other (briefly describe) _____

Please list any implanted medical devices

Physicians

_____	_____
Name	Email/Phone
_____	_____
Name	Email/Phone
_____	_____
Name	Email/Phone
_____	_____
Name	Email/Phone

Additional Remarks

Legal Documents

Your most important estate documents are those designed to protect your assets and to safeguard the rights of your family and loved ones in the event of your death. Certain other legal documents that allow for your wishes to be carried out in the event you are incapacitated are also important. If you have not already done so, please prepare the documents described on this page.

Last Will & Testament

A Last Will & Testament allows you to specify how your assets will be distributed when you die. It will allow you to appoint an executor for your estate to ensure that your wishes be carried out. In a will, you can appoint a guardian to care for your children, and a trustee to manage assets that are left to children and young adults. Your will should be updated whenever appropriate.

Location

Date of Will

Attorney/Firm who drew Will

Phone/Email

Living Trust

A Living Trust, which usually includes a will, creates more complete protection for your assets. There are various types of trusts, including a "bypass" trust that can protect your heirs from heavy estate taxes. It allows you to assign any or all of your assets to the trust, which then "bypasses" estate taxes by transferring ownership of the trust to your heirs and delaying the payment of taxes until a much later date. As with a will, your Living Trust can be changed, revoked and/or updated at any time. Without these documents, the government will determine how your assets will be distributed and how much tax your estate will have to pay on these assets.

Location

Date of Trust

Attorney/Firm who drew Trust

Phone/Email

Power of Attorney

Is it important that someone is able to make your financial decisions if you become incapacitated. A Durable Power of Attorney (DPA) allows you to grant this person as much power as you wish over your affairs, and to designate an alternate in the event your first choice is not available.

Location

Date of DPA

Attorney/Firm who drew DPA

Phone/Email

Health Care Directive

An Advance Health Care Directive (AHCD) allows you to control the types of medical procedures that you want provided or withheld in the event of an incapacitating illness or injury. An AHCD allows you to specify if you want to go on life support in extreme situations, and to designate someone who will make sure that your wishes are carried out. Without an executed DPA or AHCD, the courts may have power over such decisions.

Location

Date of AHCD

Primary Agent

Phone/Email

Financial Information Advisors | Contacts

Fill in names, phone numbers, and email addresses below for each type of advisor. Where there is more than one advisor in a category, it could be helpful to indicate the type of service each one provides, (e.g., for “Attorneys”, indicate “Business,” “Personal” or “Estate Planner;” under “Insurance Agents”, indicate “Life” or “Medical”).

Attorneys

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Insurance Agents

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Financial Documents

Stockbrokers

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Financial Advisors

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Name	Email/Phone
------	-------------

Insurance | Banking

Life Insurance Policies

Include Insurer's Name; Policy Number and Amount; Beneficiary Information; Carrier and Agent Information

Where my insurance policies are located

Bank Accounts

Include Account Number and Type; Name on Account; Name of Bank Contact, Address, Phone

Please stop Auto-Pay

Safety Deposit Boxes | Storage Units

Include Name, Address, Phone and Contact for Box/Unit Location; Location of Keys; any Notes

Assets

Readily Marketable Securities

Include Number and Description of Shares, Where Located or Held

Non-Readily Marketable Securities

Include Number and Description of Shares, Where Located or Held

IRAs & Pensions

Include Type of Account, Description of Holdings, Where Located or Held

Accounts, Notes Receivable

Include Name, Address, Phone, Email of Debtor; Amount of Debt; Location of Papers

Assets

Properties

Include Property Type, Address, Location of Papers

Vehicles

Include type of vehicle (automobile, RV, motorcycle, boat, etc.), where located, location of keys)

Trusts Created

List name of trust, names and addresses of trustees and name and address of trust beneficiaries.

Name and address of attorney who prepared trust agreement

Other

Include type heirlooms and special collections and where located

Tax Records

Location of copies of income tax returns



Estate Distribution

Liabilities

Mortgages

Mortgage Holder Information, Loan Number, Amount; Property Type, Address;

Location of Papers

Please stop Auto-Pay

Car Loans

Note Holder Name, Address, Phone; Loan Number, Amount; When Due; Location of Papers

Please stop Auto-Pay

Other Notes Payable

Note Holder Information; Loan Number, Description, Amount; When Due, Location of Papers

Please stop Auto-Pay

Credit Card

Accounts

Company, Address, Phone, Cardholder; Account Number; Type (e.g., VISA); Location of Records

Estate Distribution

ASSETS	Yours	Spouse's	Jointly	Total
Cash (checking & savings)	\$ _____	\$ _____	\$ _____	\$ _____
CDs and Money Markets	\$ _____	\$ _____	\$ _____	\$ _____
Business Interests	\$ _____	\$ _____	\$ _____	\$ _____
Securities, Bonds, Mutual Funds	\$ _____	\$ _____	\$ _____	\$ _____
Retirement Benefits	\$ _____	\$ _____	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Real Estate (from page 7)	\$ _____	\$ _____	\$ _____	\$ _____
Farming Interests	\$ _____	\$ _____	\$ _____	\$ _____
Personal Property	\$ _____	\$ _____	\$ _____	\$ _____
Trusts Assets	\$ _____	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____	\$ _____
Mortgages held/ Notes receivable	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL ASSETS/ESTATE	\$ _____	\$ _____	\$ _____	\$ _____

Estate Distribution

LIABILITIES	Yours	Spouse's	Jointly	Total
Mortgages	\$ _____	\$ _____	\$ _____	\$ _____
Loans:				
Auto	\$ _____	\$ _____	\$ _____	\$ _____
Personal	\$ _____	\$ _____	\$ _____	\$ _____
Insurance	\$ _____	\$ _____	\$ _____	\$ _____
Bills:				
Credit Cards	\$ _____	\$ _____	\$ _____	\$ _____
Dept. Stores	\$ _____	\$ _____	\$ _____	\$ _____
Other	\$ _____	\$ _____	\$ _____	\$ _____
Taxes Owed:				
Federal	\$ _____	\$ _____	\$ _____	\$ _____
State	\$ _____	\$ _____	\$ _____	\$ _____
Property	\$ _____	\$ _____	\$ _____	\$ _____
Other Liabilities:				
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
_____	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL LIABILITIES	\$ _____	\$ _____	\$ _____	\$ _____

ESTIMATED NET WORTH

Total Assets	\$ _____	\$ _____	\$ _____	\$ _____
Total Liabilities (<i>minus</i>)	\$ _____	\$ _____	\$ _____	\$ _____
ESTIMATED NET WORTH	\$ _____	\$ _____	\$ _____	\$ _____

Estate Distribution

Specific Bequests: If there is some specific item or piece of property that you wish to go to a certain individual, please list below. Also, if you wish to bequeath a specific sum of money to a person, your parish, Catholic Charities, a Catholic school, the diocese and/or another organization, please list that information below.

Item, Property or Person or Organization	Address	Sum of Money
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

The simplest way to divide the residue (the remainder of your estate after any specific bequests) is by percentages. After listing the person(s) or organization(s) you wish to remember, then state what percentage of the total remaining amount of your estate each is to receive.

Person or Organization	Address	%
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Executor/trix

An executor/trix is your personal representative, appointed by you to carry out your wishes. To allow for unforeseen circumstances, it would be well to name an alternate executor/trix or personal representative.

_____	_____
Name of Executor/trix	Alternate Executor/trix
_____	_____
_____	_____
_____	_____
Address	Address

Catholic Funeral and Financial Planning Guide



T H E
CATHOLIC
FOUNDATION

of the Diocese of Jackson, Mississippi, Inc.

For more information please contact:

Rebecca Harris

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