

My Life Record



COURTESY OF ROYAL NEIGHBORS OF AMERICA®



PERSONAL INFORMATION
DATOS PERSONALES

NAME _____ PHONE _____
ADDRESS _____
BUSINESS ADDRESS _____ PHONE _____
DRIVING INFORMATION _____
PLATE# _____



230 16th Street • Rock Island, Illinois 61201
(309) 788-4561 • (800) 627-4762
royalneighbors.org



INSURING LIVES
SUPPORTING WOMEN
SERVING COMMUNITIES™





We're pleased to provide you with this complimentary personal record book to assist you in managing your personal and financial life. It was designed to save you time and effort, as well as help your loved ones manage your affairs if you're unable to do so.

As we continue our legacy of empowering women and those they care about to achieve financial security, we are dedicated to enhancing the quality of your life. We hope this book fulfills a part of that commitment by giving you an easy method of organizing your important information, including your medical history, education, tax records, financial assets, etc. In turn, it will be a special gift to your family members when they're most in need of help and support.

We encourage you to complete the book and update it as necessary. Keep it in a safe location, and tell a trusted relative or friend where it is in case of an emergency. Royal Neighbors does not have access to any records you complete, update or save.

It's about your life and the gift you give your family.

– Your friends at Royal Neighbors

P.S. If you need to update your beneficiary, please contact us at (309) 788-4561.





This book contains valuable information about your personal, financial, and medical history. Because it provides details about your identity, please use with caution and keep in a safe, locked place where the contents cannot be accessed by anyone other than those you trust.

Table of Contents

Personal and Family Information	4	How Can I Help My Family?	16
Emergency Contacts	7	Secure the Future with Life Insurance	17
Medical Information	8	Reassess Your Life Insurance Coverage	18
Financial Information	9	Survivors' Guide	19
Insurance and Stock Certificates	11	Notes	20
Additional Financial Information	12	Exclusive Programs for our members	22
Website Information	13	<i>Insurance with a DifferenceSM</i>	23
Final Arrangements	14		

My Royal Neighbors agent is:





Personal and Family Information

Full Legal Name _____

Address _____

City _____ State _____ ZIP _____

Email address _____

Place of Birth (hospital) _____

Address _____

County _____

City _____ State _____ ZIP _____

Where is your birth certificate kept? _____

Social Security number _____

Where is your card kept? _____

Passport number _____

Issue date _____

Expiration date _____

Where is your passport kept? _____

Employment

Employed Retired

Occupation _____

Employer _____

Address _____

City _____ State _____ ZIP _____

Telephone number _____

Email address _____





Marital Status

Married Single Divorced Widowed

Spouse's name _____

Spouse's Social Security number _____

Spouse's cell phone number _____ Spouse's work phone number _____

Spouse's email address _____

Date of marriage _____

Place of marriage _____

Where is your marriage certificate kept? _____

Military Service Yes No

Dates of service _____ War _____

Branch _____ Rank _____

Serial number/service number _____

Where are your service papers kept? _____

Military honors/decorations:

If service-connected disability, your claim number:





Family

Mother's name (including maiden name) _____

Mother's birthdate _____

Father's name _____

Father's birthdate _____

Children (include spouse's children)

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Grandchildren

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____

Name _____ Birthdate _____





Emergency Contacts

Who to notify in an emergency:

1. Name _____
Relationship _____
Address _____
City _____ State _____ ZIP _____
Telephone number _____
Email address _____
2. Name _____
Relationship _____
Address _____
City _____ State _____ ZIP _____
Telephone number _____
Email address _____
3. Name _____
Relationship _____
Address _____
City _____ State _____ ZIP _____
Telephone number _____
Email address _____
4. Name _____
Relationship _____
Address _____
City _____ State _____ ZIP _____
Telephone number _____
Email address _____





Medical Information

Identifying marks or scars:

My fingerprints have been taken: Yes No

My DNA is on record at:

Allergies

Doctors

Name _____ Telephone _____

Area of practice _____

Name _____ Telephone _____

Area of practice _____

Name _____ Telephone _____

Area of practice _____

Name _____ Telephone _____

Area of practice _____

Medical Care Preferences

Living wills and other advance directives are written, legal instructions regarding your preferences for medical care if you are unable to make decisions for yourself.

I have a living will: Yes No

Where is your living will kept?

I am an organ donor: Yes No





Financial Information

Checking/Savings Account(s)

Checking Savings

Institution _____

Account number _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Checking Savings

Institution _____

Account number _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Checking Savings

Institution _____

Account number _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Safe Deposit Box

Number _____

Location/Institution _____

Combination and/or where key is kept:





Credit Cards

Institution _____

Credit card type (MasterCard, Visa, American Express, etc.) _____

Account number _____

3-digit security code from back of card _____ Expiration date _____

Toll-free telephone number _____

Institution _____

Credit card type (MasterCard, Visa, American Express, etc.) _____

Account number _____

3-digit security code from back of card _____ Expiration date _____

Toll-free telephone number _____

Institution _____

Credit card type (MasterCard, Visa, American Express, etc.) _____

Account number _____

3-digit security code from back of card _____ Expiration date _____

Toll-free telephone number _____

Mortgage

Institution _____

Location of deed _____

Account number _____

Home equity loan _____

Certificates of Deposit (CDs)

Institution _____

Certificate number _____

Where is your CD kept? _____

Institution _____

Certificate number _____

Where is your CD kept? _____

Additional information can be noted on page 12.





Insurance and Stock Certificates

Life, Health, and Accident Insurance Policies

Life Health and Accident

Provider _____

Certificate number _____

Where is your policy/Certificate kept? _____

Agent name _____

Agent telephone number _____

Life Health and Accident

Provider _____

Certificate number _____

Where is your policy/Certificate kept? _____

Agent name _____

Agent telephone number _____

IRA or 401(k)

IRA 401(k)

Institution _____

Certificate number _____

Where is the Certificate kept? _____

IRA 401(k)

Institution _____

Certificate number _____

Where is the Certificate kept? _____

Stocks/Bonds

Location _____

Portfolio/Account number _____

Annuities _____

Other investments _____





Website Information

Internet Accounts, Email Addresses, and Passwords

Website _____

Account login name _____

Password _____

Website _____

Account login name _____

Password _____

Website _____

Account login name _____

Password _____

Website _____

Account login name _____

Password _____





Final Arrangements

Last Will and Testament

Date of my last will _____

Where is my will kept? _____

Lawyer's name/Law firm _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Executor(s) of Will

Name _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Name _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Cemetery Plot

Cemetery name _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Plot number _____ Where is my plot deed kept? _____

Other notes:





Funeral Preferences

Funeral Director/Funeral Home _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Cremation Yes No

Church

Name _____

Address _____

City _____ State _____ ZIP _____

Telephone _____

Pallbearers

Name _____ Telephone _____

Name _____ Telephone _____

Name _____ Telephone _____

Name _____ Telephone _____

Name _____ Telephone _____

Name _____ Telephone _____

Special Service Requests

Hymns _____

Flowers _____

Special Instructions:

Donations can be made to:





How Can I Help My Family?

Consider a Living Will

You should consider a Living Will. A Living Will communicates your medical care preferences to your family and can include your guidance on keeping your life artificially prolonged. While you are healthy, you should check with your doctor to discuss various life-saving medical treatments that often are protected in Living Wills. They can provide you with detailed medical information you can use to make your decision.

Establish Powers of Attorney

A Power of Attorney (POA) is a document designed to allow you to appoint a trusted person or organization to manage important financial, health, and legal matters on your behalf. A durable power of attorney means the document will remain in effect or take effect if you become mentally incompetent. If a POA is not durable, and you lose the mental capacity to handle your financial affairs, your family may need to go to court to have a guardian or conservator appointed over your assets.

Powers of Attorney can have a major impact. You are encouraged to speak with a professional about your personal situation.

Prepare a will or other estate plan

It's important to have a will or other binding legal document such as a revocable trust to ensure your wishes are known after you're gone. You can make provisions for your children's care and education. And you can dictate who will manage and receive your assets when you are gone. Without properly executed documents, your estate will be disposed of under state-imposed laws that may not be consistent with your wishes. Protect your family by keeping your estate planning documents up to date.

Depending on your circumstances, you may want to seek professional assistance to prepare the appropriate document(s).

This is for informational purposes only. You should not construe any information provided as legal, tax, investment, or financial advice. Reader should consult her or his own legal advisor and conduct her or his own research and due diligence.





Secure the Future with Life Insurance

The proper amount of life insurance can provide for your family when you're no longer here to help. With life insurance, you can provide for those you leave behind with a lifetime of financial security.

When purchasing life insurance, you need to consider your long-term financial plan as well as any short-term protection needs, and how life insurance may play a part.

Term Life Insurance

For those starting out in a new career, first home, or new baby, Term Life Insurance is a good first step in protecting your financial future. It's affordable, flexible, and provides peace of mind to protect you and your family's dreams. Term Life Insurance provides death benefit coverage for a specific period of time with a fixed premium amount. It's an economical option – especially when you're young and healthy – that can help maintain your family's standard of living by paying bills such as a mortgage, auto loans, or school tuition. It also allows you to convert your Term Life Insurance to permanent life insurance in the future, at a time right for you.

Whole Life Insurance

Whole Life Insurance is permanent, no matter what life may throw your way. Whole Life Insurance provides lifelong coverage and the ability to accumulate cash value while paying level, predictable premiums. It's a cost-effective option that provides long-term peace of mind that your family is protected, as well as cash value that can be accessed in an emergency.

You can also simply buy coverage to make sure your final expenses are covered.

This is for informational purposes only. You should not construe any information provided as legal, tax, investment, or financial advice. Reader should consult her or his own legal advisor and conduct her or his own research and due diligence.





Reassess Your Life Insurance Coverage

If you currently have life insurance, keep in mind that as life changes so does your need for protection. Review your life insurance needs every few years. Any of the changes listed below should prompt you to sit down with your insurance agent or financial advisor to make sure your life insurance plan is still appropriate:

- You have recently married or divorced
- A child or grandchild has been born or adopted
- You have begun to provide care or financial help to a parent
- A child requires assistance or long-term care
- You have recently purchased a home or business
- You are planning for a child's or a grandchild's education

- You or your spouse is concerned about retirement income
- You or your spouse has recently been promoted
- You have refinanced your home mortgage in the past six months
- You or your spouse has received an inheritance

Life insurance death benefits are paid directly to your beneficiaries, and can be used to help pay final expenses, as well as long-term financial needs.

Learn how much insurance you need to protect your loved ones with the Royal Neighbors life insurance needs calculator. Run a no-obligation life insurance quote today at royalneighbors.org/products.

This is for informational purposes only. You should not construe any information provided as legal, tax, investment, or financial advice. Reader should consult her or his own legal advisor and conduct her or his own research and due diligence.





Survivors' Guide

Step 1. First calls. Make the “first calls” to notify the appropriate parties and have the deceased removed from the place of death. It may be necessary to arrange transportation between cities.

Step 2. Funeral arrangements. Meet with a funeral director to make arrangements for the funeral services, including ceremonies and care of the deceased.

Step 3. Funeral products. Select and purchase the necessary funeral products (e.g., casket, burial vault, cremation urn, etc.) and memorial items (e.g., grave marker, online memorial, etc.).

Step 4. Cemetery arrangements. Meet with representatives of the selected cemetery to purchase cemetery property (e.g., grave space, crypt, niche for an urn, etc.), and arrange cemetery services.

Step 5. Financial, estate, and other matters. Pay for the funeral services and merchandise. After the funeral, handle all estate, financial, and administrative matters of the deceased, claim death benefits, and obtain death certificates.

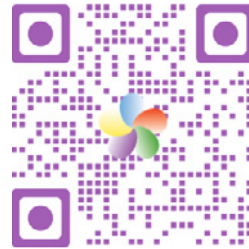




EXCLUSIVE PROGRAMS FOR OUR MEMBERS



When you join Royal Neighbors of America®, you become a member of a family over 260,000 strong. In addition to life insurance and annuities, you have access to a variety of Member Programs that help you care for your family and serve your community.



Download our app today!

You must have your certificate number and Group ID (RNA01) to register.



Community Chapters

Our chapters cultivate community connections and engage in local volunteer activities. Members who have a desire to give back through volunteerism can connect with a chapter in their area or start their own.



Difference Maker Fund

All members can apply for a Difference Maker Fund grant once a year to help offset the costs of their volunteer project and make a positive impact in their community.



Empathy

Bereavement support offering beneficiaries full-circle care through life's most challenging moments.



Member Relief Fund

Our Member Relief Fund provides financial support to qualified Beneficial Members experiencing hardship due to illness, accidents or natural disaster.



Member Savings

Members have access to prescription savings and affordable preventative health screenings.



Nation of NeighborsSM

Through our signature women's empowerment program, Nation of NeighborsSM, we empower women by recognizing and supporting their work through a nonprofit, business, or program. All members can nominate influential leaders who are doing extraordinary things to impact the lives of women and girls in their community.



RoyalConnect

RoyalConnect is a program designed to connect the community to our mission of empowering women and serving communities through small acts of kindness. Members receive a monthly email making it simple to participate.



Scholarships

Our Scholarship Program provides financial assistance to qualified Beneficial Members who plan to pursue post-secondary education at an accredited institution to obtain a trade or vocational degree, associate's degree, bachelor's degree, master's degree, or doctoral degree.

Member Savings and Philanthropy Programs are provided at the discretion of Royal Neighbors of America and are not available in all states. They are not part of any insurance or annuity contract and are not guaranteed. Health discount programs are not insurance, are not intended to replace health insurance, and cannot be used in conjunction with health insurance benefits. Insurance or annuity products should not be purchased for eligibility or maintenance of nonguaranteed Member Savings opportunities. Life insurance and annuity products should only be purchased if they meet the financial needs of the applicant. Member Savings are administered by a third party and are subject to change without notice. Not all benefits mentioned are available in all states and you should check the list of providers in your area before use.





Insurance with a DifferenceSM

Royal Neighbors of America® blends life insurance coverage with the joy of giving back. We call this *Insurance with a DifferenceSM*.

In 1895, nine founding women created a membership community. They were one of the first to make life insurance accessible to women. Today, we continue our drive to support women and their local communities through volunteerism and goodwill. Royal Neighbors serves more than 260,000 members across the country and delivered \$31.2 million of Social Good impact in 2023.

Our chapters cultivate community connections and engage in local volunteer activities.





TO LEARN MORE,
Call (309) 788-4561 or visit royalneighbors.org

230 16th Street • Rock Island, Illinois 61201
(309) 788-4561 • (800) 627-4762
royalneighbors.org



INSURING LIVES
SUPPORTING WOMEN
SERVING COMMUNITIES™

