MY AFFORDABLE
TRUCKER



My Final Wishes

A driver's planning guide for the people I love

THIS BOOK BELONGS TO

Date started

Last reviewed

How to use this book

- Keep the finished planner at home, somewhere your family can find it without a key. Tell at least one person where it is.
- Keep a short card in the cab with the name and phone of the first person to call.
- Look it over once a year, or after a big change: a new company, a new truck, a move, a marriage or a death in the family.
- This planner is a record of your wishes, not a legal document. A will is still the place for legal decisions.
- Not affiliated with or endorsed by the FMCSA, the U.S. Department of Transportation, OOIDA or any trucking company. We offer personal life insurance, not commercial truck insurance.

Keep it safe: write *where* things are kept, never your Social Security number, CDL or USDOT number, account numbers or passwords. A paper book in a drawer is no place for them.

A LETTER

To the people I love

I have filled in this book so that, if something happens to me, at home or on the road, you will not have to guess.

Inside are my wishes for my service and my resting place, the people to call, what to do about the truck and the work I leave behind, and where to find the papers you will need. I have also written down some of the memories and words I hope you will keep.

I spent a lot of miles away from you. Please take these pages as one more way I tried to take care of you.

Signature

Date

Witness

Date

A Note to My Family

A few words to go with your wishes. Many drivers write why they made these plans, and what they want the people at home to know.



PART 1

Arrangements

Everything the funeral home and the person making arrangements will need: who I am, who to call, and how I would like to be laid to rest.

1 About Me

The funeral home and the death certificate will need these details.

Full legal name

Date of birth

Place of birth (city, state)

Father's full name

Mother's full name (including maiden name)

Marital status

Spouse's name

Date of marriage

Place of marriage (city, state)

If my spouse has died: the date, and where

How I drive

- [ ] Company driver
- [ ] Owner-operator
- [ ] Leased on to a carrier
- [ ] Retired from driving

Years behind the wheel, and the kind of freight I haul

2 My Family

Names only. The funeral home and whoever writes the obituary will want the whole family, with every name spelled right.

My children, and their husbands or wives

My grandchildren

My brothers and sisters

My parents-in-law

3 Who to Call First

The people who will handle things at home. Include a phone number for each. The people to call if something happens on the road are on the On the Road pages.

First person to call _____

Executor of my will _____

Funeral home _____

Clergy or person to lead the service _____

Person who will make the final arrangements _____

Lawyer _____

Accountant or tax preparer _____

Life insurance agent (my personal policy, not the truck insurance) _____

4 My Service Wishes

Write as much or as little as you like. Your family will be grateful for any guidance.

I would like

☐ Earth burial ☐ Cremation ☐ Mausoleum or entombment ☐ Other

☐ Leave it to my family

My service should be

☐ Public ☐ Private: family and friends ☐ Private: family only

☐ No service

Visitation or viewing

☐ Yes ☐ No

Casket

☐ Open ☐ Closed ☐ No preference

Where the service should be held

Music, hymns or songs

Readings, scripture or poems

Clothing and jewelry (my work jacket, my cap, my ring)

Pallbearers

Drivers and friends from the road to invite

Flowers, or donations instead to

A truck at the service or a convoy, if my family wants one

☐ Yes, I would like that ☐ No ☐ Leave it to my family

Anything else about the service

5 My Final Resting Place

Cemetery name and location

My plot, crypt or niche is already bought ☐ Yes ☐ No

Where the papers for it are

Headstone or marker, and what it should say

If cremated, what should happen to my ashes

6 Paying for My Funeral

Knowing the money is there, and where to find it, lets your family say yes to your wishes without worry.

How it will be paid

- ☐ My personal life insurance
- ☐ Life insurance through work
- ☐ Savings
- ☐ Prepaid funeral plan
- ☐ Other

If other, how

Where the papers are (policy, bank or funeral home contract)

Anything else my family should know about paying

Two kinds of insurance: Your personal life insurance pays the people you name. Your truck insurance covers the truck and the freight, not your family. Write down both, and keep them apart.

“Every run ends at home. Planning ahead is one more way to take care of the people waiting there.”





PART 2

On the Road

Who to call if something happens away from home, the company or the business I leave behind, and where my driving papers are kept. Names and places only, never the numbers.

7 If Something Happens on the Road

You may be hundreds of miles from home. Write down who your family should call, and who should be called for them. Names and phone numbers only.

The first person at home to call

Someone near my usual routes or home terminal who could help

Dispatcher, or the person who books my loads

Safety department or fleet contact

Who can move the truck and the load if I cannot

Where my truck is usually parked when I am home

My doctor, and where my medical history is kept

Medicines I take, and where the list is kept

Anything the people on the road should know about me

8 If I Drive for a Company

The company will have its own steps. Your family needs the right names to start them. Write the names only.

Company name and main phone

Home terminal (city, state)

Human resources or benefits contact

Life insurance or benefits I have through the company

Union or association, if any

Where my last pay stubs and benefits papers are kept

Ask about work benefits: Many companies offer life insurance as a work benefit. It usually ends when the job ends, and it is separate from any policy you own yourself. Write down both.

9 If I Own My Truck

An owner-operator leaves a small business behind. Write down who to call about it. Company names and people only, never the numbers.

Who should look after the truck and the business at first

Loads in progress: the broker or shipper to call

Carrier I am leased on to, if any

Factoring company, if any (name only)

Truck insurance agent (commercial policy)

Lender or leasing company for the truck or trailer (name only)

Accountant or bookkeeper

What I would like done with the truck ☐ Sell it ☐ Keep it in the family ☐ Let my family decide

Anything else about the business

10 Where My Driving Papers Are Kept

Write WHERE each paper is kept (in the cab, at home, at the terminal, with the accountant), never the numbers on it.

My CDL	
DOT medical card	
Truck title	
Registration and cab card	
Permits and operating authority papers	
Lease agreement with a carrier	
Truck insurance policy	
Fuel tax and mileage records	
Logbook and trip records	
Spare keys to the truck	
Where my list of passwords is kept (ELD, load boards, fuel cards)	

Passwords: Don't write passwords in this booklet. Write only where your list is kept.



PART 3

Remembrances

A life deserves to be remembered in its own words. These pages help with the obituary and the eulogy, and become a keepsake for the family.

11 For My Obituary

Family members often forget details at a hard time. A few notes here make writing it easier.

My name as it should appear, and my CB handle if I want it used

Newspapers or websites to publish it

Family to list (the names are on the My Family page; add anyone else here)

Schooling, work and the companies I drove for

Church, clubs and organizations

Things I am proud of

Photo to use, and where it is

12 How I Want to Be Remembered

This page becomes a keepsake. Some families have a grandchild interview their grandparent to fill it in.

One of my fondest memories

My favorite road, run or place I have driven

The people and places that shaped me

Beliefs I would like shared at my service

What I would like my family to remember about me

My favorite song, scripture, flower or place

A final message to the people I love

13 My family tree

Write a name in each box, and a few words about each person: a memory, a habit, what made them who they were.

My grandparents

My grandparents

My grandparents

My grandparents

My mother

My father

Me

My spouse

My children

My children

My children

My grandchildren

My grandchildren

My grandchildren

My grandchildren



PART 4

Practical Matters

Where to find my papers, my personal life insurance, the accounts to settle and the people to tell. Write where things are kept, never the numbers.

14 Where to Find My Important Papers

Write WHERE each one is kept, not the numbers. Never write passwords, account numbers or your Social Security number in this planner.

My will _____

Trust papers _____

Personal life insurance policies _____

Prepaid funeral contract _____

Birth and marriage certificates _____

Social Security and Medicare cards _____

Passport _____

Military discharge papers, if any _____

House deed and mortgage papers _____

Homeowners insurance policy _____

Car titles _____

Car insurance policy _____

Tax returns _____

Safe deposit box (bank, and who has a key) _____

15 My Personal Life Insurance

Your personal policies, not the truck insurance. Your beneficiary will need to know each policy exists to file a claim. Include any life insurance you have through work.

Insurance company	Agent and phone	Beneficiary	Where the policy is kept

16 Accounts My Family Will Need to Close or Claim

Bank, retirement, pension, credit cards, fuel cards, Social Security and utilities. List the company only; your executor will get the details.

Company or agency	Type of account	Notes

17 People to Tell

Friends, relatives and the drivers I came up with, who should hear the news personally.

Name	Relationship	Phone or email

Additional notes

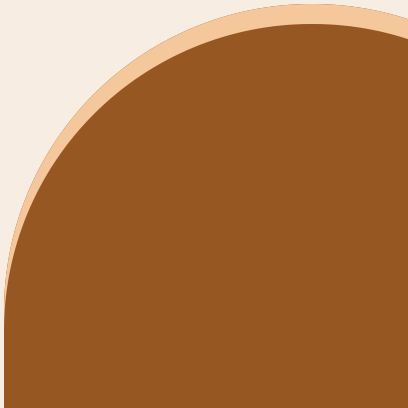
FOR MY FAMILY

A few words on grief

Grief is the price of love, and there is no right way to carry it. Some days will be harder than others, and that is normal.

Lean on each other. Talk about me, tell the road stories, and laugh when you can. If the weight does not lift, reach out to your doctor, your faith community or a grief counselor. Asking for help is a sign of strength.

Most of all, look after yourselves. That is what I would want.



MY AFFORDABLE TRUCKER INSURANCE

A free planner from My Affordable Trucker Insurance, a trade name of The CRM Center LLC.

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