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## FUNERAL PLANNING GUIDE

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Creating a meaningful funeral is important. This is why we've created this checklist and planning tool to help you plan your end of life, your way.

This guide is not meant to hinder your creativity, yet to allow for more robust ideas.

Planning your own funeral allows your family and friends time to mourn your loss without having to guess at what your wishes would have been. Give yourself the funeral you desire while allowing your loved ones to mourn, and celebrate, your life.

# Step-by-Step Funeral Planning Checklist

This step-by-step guide is meant to walk you through the planning process from beginning to end. The planning forms we've included are meant to help you tell the story of you, your way.

## Step One

### **Biographical Information**

This form provides core details about your life, education, career, religious affiliations and military history. Be as thorough as you can, it's your funeral.

## Step Two

### **Disposition & Personalization Plans**

This allows you to clearly outline your wishes, such as:

- Reception location
- Funeral ceremony details
- Committal service (if buried)
- Location and other details for gathering after the ceremony

## Step Three

### **Ceremony & Tribute Plans**

Here you'll outline relationships you would like to acknowledge, passions you want honored and memories you want shared.

Additionally, you can outline special eulogy mentions, preferred readings and music; special symbols and/or other personal touches you want present.

## Step Four

### **Checklists & Information for Family Members**

In an effort to assist your family with sun downing your financial and social life, we've created a checklist, helpful tips and an obituary form to simply send (allowing you to tell the world exactly how you want to be remembered).

# Biographical Information

Full Name: \_\_\_\_\_

Religion: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Church Affiliation: \_\_\_\_\_  
\_\_\_\_\_

Sex: *Circle One*    Male    Female

Clubs/Organizations: \_\_\_\_\_  
\_\_\_\_\_

Date of Birth: \_\_\_\_\_

### Veterans

*Attaching a copy of your discharge papers (form DD214)  
can help your family prove your service time.*

Place of Birth: \_\_\_\_\_  
\_\_\_\_\_

Are you a veteran: *Circle One*

Yes                      No

SSN: \_\_\_\_\_

Marital Status: *Circle One*

War: \_\_\_\_\_

Married    Never Married    Widowed    Divorced

Branch: \_\_\_\_\_

Name of Spouse: *Living or deceased*  
\_\_\_\_\_

Rank: \_\_\_\_\_

Father's Name: \_\_\_\_\_  
\_\_\_\_\_

Service Number: \_\_\_\_\_  
\_\_\_\_\_

Mother's Name: \_\_\_\_\_  
\_\_\_\_\_

Entered Service (Date and place): \_\_\_\_\_  
\_\_\_\_\_

Education: *Highest grade completed*  
\_\_\_\_\_

Separated Service (Date and place): \_\_\_\_\_  
\_\_\_\_\_

Occupation: *List your last career not retired*  
\_\_\_\_\_

Business or Industry: \_\_\_\_\_  
\_\_\_\_\_

Military Honors: *Circle One*

Yes                      No

Family member to contact for arrangement details:

Name: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Phone 2: \_\_\_\_\_

# Ceremony & Tribute

What kinds of memories would you like your friends and family to have once you're gone?

- Stationery
- Memorial books
- Acknowledgement cards
- Video tributes

Survivors (list family and friends and other relationships you will want to acknowledge):

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Hobbies or passions you want to honor:

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Memories to share:

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Eulogy special mentions:

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# Ceremony & Tribute

*Continued*

Preferred Readings:

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Preferred Music:

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Symbols:

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Additional Touches:

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# Disposition & Personalization Plans

Do you prefer (circle one): Burial or Cremation

Do you have preferences regarding your burial or cremation options?

## Burial

- Casket
- Vault for Casket
- Monument/headstone

## Cremation

- Memorial Urn
- Urn Vault
- Jewelry (cremation ashes)

Preferences: (For example, do you prefer a specific casket? Would you like jewelry made from your ashes? If you want a monument/headstone what should your epitaph read?)

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## Epitaph

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## Visitation or Memorial Reception

Location:

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Personal touches to be included:

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# Disposition & Personalization Plans

*Continued*

## Funeral Ceremony

Location: \_\_\_\_\_

Type of Service: (*religious, non-denominational*)

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Person to lead ceremony: (*pastor, sister, best friend*)

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Additional friends/family who would like to say a few words:

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Pallbearers:

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## Committal Service (if burial)

Cemetery: \_\_\_\_\_

Personal touches to be included:

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# Your Preferences

What would you like to wear? (*Circle your preferences below or write them in*)

Men

Suit

Shirt

Underclothes

Socks

Tie

Shoes or Slippers

Dentures

Glasses

Rosary

Women

Dress

(High collar/long sleeves)

Underclothes

Hose

Shoes or Slippers

Dentures

Glasses

Jewelry

Rosary

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Additional Instructions: For example, do you wish your family to bury your jewelry, donate or give to family?

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## Family Checklist & Information

This sheet can help your family understand the tasks they'll need to complete in order to properly sun down your financial and social life.

Below is a list of documents your family will need to close your accounts. **Remember** to tell your family where all of these documents can be found.

- |  |   |
|--|---|
| <input type="checkbox"/> Will                  | <input type="checkbox"/> Bank Documents             |
| <input type="checkbox"/> Deed to cemetery plot | <input type="checkbox"/> Title to Property          |
| <input type="checkbox"/> Birth Certificate     | <input type="checkbox"/> Title to Vehicle           |
| <input type="checkbox"/> Marriage Certificate  | <input type="checkbox"/> Tax Returns                |
| <input type="checkbox"/> Insurance Policies    | <input type="checkbox"/> Military Discharge (DD214) |

Additional documents:

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Below you'll find a list of people that should be contacted. **Remember** to include where the contact information can be found for those included below.

- |  |  |
|--|--|
| <input type="checkbox"/> Immediate and extended family | <input type="checkbox"/> Insurance Agent               |
| <input type="checkbox"/> Friends                       | <input type="checkbox"/> Creditors                     |
| <input type="checkbox"/> Doctors                       | <input type="checkbox"/> Clubs, Unions & Organizations |
| <input type="checkbox"/> Accountant                    | <input type="checkbox"/> Financial Advisor             |
| <input type="checkbox"/> Lawyer                        | <input type="checkbox"/> Banker                        |
| <input type="checkbox"/> Employer                      |  |

Additional contacts:

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## Death Certificate Needs

Your family will need several copies of your certified death certificate. In an effort to clear up any confusion and answer questions, we've compiled a list of reasons where a certified death certificate(s) will be required.

- Life Insurance** (1 for each insurance company, regardless of the number of policies)
- Banks** (1 for each bank, particularly if the account is in the deceased's name only)
- Stocks** (1 per company, if held individually or jointly. If held by a broker, 1 for each broker)
- Bonds** (1 for each U.S. Savings Bond. Bonds can be re-issued to new co-owners. If you have corporate bonds, you will need 1 per company)
- Real Estate** (1 for each county in which property is owned)
- Secretary of State** (1 certified copy may be used for automobile, boat and/or mobile home)
- IRAs / Individual Retirement Accounts** (1 for each financial institution where funds are maintained)
- CDs / Certificate of Deposit** (1 for each financial institution where funds are maintained)
- Pension** (1 per pension fund)
- Health Insurance** (1 if insurance is provided by an employer)
- Current/Vacation Pay** (1 if the deceased was still actively employed)
- 401K / 403B / Retirement Plans** (1 for each depository)
- Federal Income Tax** (1)
- State Income Tax** (1)
- Local Income Tax** (1)
- Probate** (If there is to be a probate of the estate, you will need at least 5 certified copies)

## Obituary Template

Below you'll see an obituary template. Read through the template to gain a better understanding of the information your family will need. Then, on the next page you'll find a template with blank spaces that will allow you to write in your answers.

**{Title or Position} {Name} "{Nickname}" {Last Name} ({Maiden Name})** died **{unexpectedly/peacefully}** in **{location}** on **{date}** in **{City, State}** at the age of **{age}**.

**{Name}** is survived by **{his/her} {parents, Name and Name of Location; wife/husband, Name; children, Names; siblings, Names of Locations}**. **{He/she}** is preceded in death by **{relatives, Names, of Locations}**.

**{Name}** was born on **{date}** in **{City, State}** to **{Parent Names}**. **{He/she}** graduated from **{School}** in **{year}** with a degree in **{field}**. **{He/she}** married **{Name}, {his/her high school sweetheart/a mechanical engineer/etc.}** in **{year}**. After moving to **{Location}**, **{Name}** began working for **{Company}** as a **{position}**. Over **{period of time}**, the couple welcomed **{number}** children into their home and **{Name}** set about teaching them **{skill/trade}**. **{His/her}** children remember **{him/her}** as a **{kind/gentle/patient/driven} {father/mother}** who encouraged them to pursue their goals.

**{Name}** was accomplished at **{skill/talent}** and often **{example of talent}**. **{He/she}** was a **{generous/witty/dedicated}** individual who loved **{subject}** and who was passionate about **{changing the world/educating students/bacon/etc.}**. **{He/she}** was an active and dedicated member of the **{Church/Club/etc.}** and often volunteered at **{location}**.

A funeral is scheduled for **{time and date}** at **{location}**, with a reception to follow at **{location}**. **{Title} {Name}** will officiate the ceremony. All are welcome to attend and celebrate **{Name}**'s life.

In lieu of flowers, please send donations to **{Charity/Hospital/person/etc.}** at **{address}**. Condolences can be sent to **{URL}**. The family would like to thank **{caregivers/hospital staff/etc.}** for **{his/her/their} {efforts/care/dedication}**.

## Your Personalized Obituary

\_\_\_\_\_ died \_\_\_\_\_ in \_\_\_\_\_ on \_\_\_\_ [Family will enter the date and time] in \_\_\_\_\_ at the age of \_\_\_\_\_.

\_\_\_\_\_ is survived by

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ is preceded in death by \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_.

\_\_\_\_\_ was born on \_\_\_\_\_ in \_\_\_\_\_ to \_\_\_\_\_.

\_\_\_\_\_ graduated from \_\_\_\_\_ in \_\_\_\_\_ with a degree in \_\_\_\_\_. \_\_\_\_\_ married \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ in \_\_\_\_\_. After moving to \_\_\_\_\_, \_\_\_\_\_ began

working for \_\_\_\_\_ as a \_\_\_\_\_. Over \_\_\_\_\_, the couple welcomed \_\_\_\_\_ children into their home and \_\_\_\_\_ set about teaching them \_\_\_\_\_. \_\_\_\_\_ children remember \_\_\_\_\_ as

a \_\_\_\_\_ who encouraged them to pursue their goals.

\_\_\_\_\_ was accomplished at \_\_\_\_\_ and

often \_\_\_\_\_.

\_\_\_\_\_ was a \_\_\_\_\_ individual who

loved \_\_\_\_\_ and who was passionate

about \_\_\_\_\_

\_\_\_\_\_.

\_\_\_\_\_ was an active and dedicated member of the \_\_\_\_\_ and

often volunteered at \_\_\_\_\_.

A funeral is scheduled for \_\_\_\_\_ at \_\_\_\_\_,

with a reception to follow at \_\_\_\_\_.

\_\_\_\_\_ will officiate the ceremony. All are welcome

to attend and celebrate \_\_\_\_\_'s life.

In lieu of flowers, please send donations to \_\_\_\_\_

at \_\_\_\_\_.

Condolences can be sent to \_\_\_\_\_.

The family would like to thank \_\_\_\_\_

\_\_\_\_\_ for \_\_\_\_\_

\_\_\_\_\_.