

The Personal Family Guide

For advance planning of a funeral



*It isn't a
question
of if, but a
matter
of when.*

*Advance
planning
ensures that
someone you
care about will
never have to
make all the
decisions alone.*



*Someday everyone
will receive that
phone call.*

*“I’m **SORRY** to have
to tell you this...”*

If there had been a death in your family yesterday, what would you be doing today?

Survivor's Checklist

*Over 80 Points to deal with * Indicates details that can be arranged before an emergency*

SECURE VITAL STATISTICS

- 1 * Name, home address and telephone number
- 2 * How long in State
- 3 Last Place of Employment
- 4 * Name of business, address and telephone number
- 5 * Occupation, Type of Business and Title
- 6 * Social Security Number
- 7 * War Veteran's Serial number
- 8 * Date of Birth
- 9 * Place of Birth (state, county & municipality)
- 10 * Last grade of education completed
- 11 * Father's name & birthplace
- 12 * Mother's maiden name & birthplace

EXPENSES TO CONSIDER

- 13 * Merchandise such as casket, vault, cremation urn, etc.
- 14 * Family Burial Estate, mausoleum crypts or niche
- 15 * Funeral Director Expenses
- 16 * Cemetery charges for opening and closing of grave, crypt or niche
- 17 Permanent memorialization
- 18 Clergy, Organist, Soloist
- 19 Florist
- 20 Clothing
- 21 Transportation
- 22 Long distance Telephone and/or wire service
- 23 Food for memorial reception and/or visitors
- 24 Doctors, Nurses and Hospital or Nursing Home
- 25 Ambulance
- 26 Medications
- 27 Other current bills due (mortgage, rent, taxes, etc.)

LOCATE AND COLLECT DOCUMENTS

- 28 * Last Will & Testament
- 29 * Legal proof of age or birth certificate
- 30 * Social Security card or number
- 31 * Marriage license
- 32 * Citizenship papers (if applicable)
- 33 * Insurance policies (life, accident, health, property)
- 34 * Bank books and listing of accounts
- 35 * Deeds to property, automobile and other titles
- 36 * Income tax returns, receipts or cancelled checks
- 37 * Veteran's Honorable Discharge certificate
- 38 * Disability claims
- 39 * Cemetery proof of ownership

DECIDE AND ARRANGE WITHIN A FEW HOURS

- 40 * Burial estate location and which space to use
- 41 * Casket
- 42 * Burial Vault
- 43 * Clothing for deceased
- 44 * Marking of grave, either temporary or permanent
- 45 * Type of tribute ceremony (traditional, contemporary, religious, non-religious, military, fraternal)
- 46 * Special selections of scripture, poetry or readings
- 47 * Clergy to officiate and/or Individual(s) to provide eulogy
- 48 * Service provider to handle arrangements
- 49 * Place where tribute ceremony should be conducted
- 50 Time of tribute ceremony
- 51 * Decide charity for memorial contributions (if any)
- 52 Provide information for eulogy
- 53 * Select pallbearers
- 54 * Flowers
- 55 * Music
- 56 Clothing for you and minor children
- 57 Preparation at home, including food for family and guests
- 58 Extra chairs if needed
- 59 Transportation including planning cortege list
- 60 Checking and signing necessary papers for burial permit
- 61 * Providing vital statistics about deceased for newspapers
- 62 * Providing addresses and phone numbers of family members
- 63 Answering innumerable sympathetic phone calls and messages
- 64 Meet with funeral director, cemetery representative and clergy
- 65 Greeting all friends and relatives who call
- 66 Arrange to meet out-of-state relatives arriving at airport
- 67 Provide or arrange lodging for out-of-town relatives
- 68 List floral tributes received at home to mail card of thanks
- 69 * Arrange for special religious ceremony
- 70 * Examine Will regarding special wishes
- 71 Order certified copies of death certificate
- 72 Look after minor children

NOTIFY AS SOON AS POSSIBLE

- 73 Doctor or Coroner
- 74 Funeral Director and Clergy
- 75 All Relatives and Friends
- 76 Employer of deceased
- 77 Employer of relatives not going to work
- 78 Pallbearers
- 79 Religious, fraternal, civic, veterans organizations and unions
- 80 Newspaper regarding notices
- 81 Attorney, Accountant, Executor of Estate
- 82 Insurance agents and broker if applicable

Why leave the burden of decisions to fall on someone close to you, perhaps alone, with other responsibilities on their mind and most likely on the worst day of their life?



*Pre-planning is
for the benefit
of those you love.*

It is a matter of personal choice.
But in the end, we are each remembered either for the
things we have done or the things we have not done.

How do you choose to be remembered?



Because of love, I leave the following detailed instructions.

Life Review

What has given you the most enjoyment in life? _____

Have you had a guiding personal philosophy about life or a spiritual point of view? _____

Who are your closest friends? _____

Have you been a member of any groups or special activities that were important? If so, what? _____

What type of music do you listen to at home or in the car? _____

Is there anything in life you were disappointed with? _____

Have you ever seen anything done at a funeral that you found objectionable that we should know about?

Biographical Information

Name _____ Born (Municipality) _____ State _____

Current Address _____ At Current Address Since _____

Birth Date _____ Social Security Number _____ Marital Status _____

Last grade of education completed _____ Name of Spouse (include Maiden name) _____

Last Place of Employment or Currently Employed by or Retired from _____

Occupation and Type of Business _____

Father's name _____ Mother's full maiden name _____

Are you a Veteran? _____ Branch of Service _____

Your Family (children, grandchildren, brothers, sisters,...)

Average Funeral Expense \$136



According to our records, in 1925 this was the average funeral expense including casket, funeral director services, cemetery expense and flowers!

In the past few decades, we have witnessed inflation rates from low single digits to as high as 18%. If inflation would average about 6% per year, look at the impact on future costs!

Example:

Today \$10,000

5 Years \$13,382

10 Years \$17,909

15 Years \$23,965

20 Years \$32,071

You cannot avoid final expenses but you **can** avoid the impact of inflation. Protect your family and estate with a plan that provides a

guaranteed inflation-proof price at today's lower cost.

Two options for pre-funding final expenses

A. Revocable Trust

B. Irrevocable Trust

Both options provide important benefits

1. Inflation Proof Guaranteed Price
2. The funds are there when needed for the purpose intended, unlike the cash value of the typical life insurance policy or savings account, the funds cannot be accessed or removed by any government agency, nursing home or well meaning third party.
3. Value is exempted for SSI or Medicaid qualification.
4. Control the cost, avoid emotional overspending and lock-in today's lower price with pre-planning.
5. You will know the costs and never have to worry about out living your funds.



Thousands of clients have told us
Three reasons
why they feel preplanning is so important.

PEACE OF MIND

It's a good feeling to know these unavoidable arrangements are taken care of and that your family will not be burdened with additional and major financial decisions at a time of great emotional stress.

ECONOMY

You save as you control the cost and avoid emotional overspending. You also inflation protect your arrangements so the cost is locked-in and will never increase.

PERSONAL CHOICE

A tribute ceremony will be provided in accordance with your wishes.



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