

## Preplanning Checklist

The following checklist will help you to make sure you've thought of everything when you begin creating your personalized plan. Remember that there's no need to make all the decisions right away, and that the purpose of pre-planning is to allow yourself to take the time you need when considering your options and making the choices that are right for you. For personalized assistance in creating your plan, consult one of our experts by contacting us to schedule a one-on-one meeting.

### Information you'll need to assemble:

#### **Vital Statistics**

- This includes your father's name, your mother's maiden name, your level of education, and your social security number.

#### **Affiliations**

- This includes fraternal, service, or union membership, along with any special recognitions you might have

#### **If you're a veteran, you'll also need to include:**

- Military service
- Branch rank
- Date of enlistment
- Date of discharge
- Name(s) of war/conflict(s) toured
- Serial number

### Ways in which you can plan ahead:

#### **General**

- Gather personal information for your obituary
- Choose a charity to direct donations to, if desired
- Choose a funeral home
- Make note of any special instructions you desire for your services and final disposition

### **Funeral Service**

- Choose burial or cremation
- Select a casket or cremation container
- Choose the location and type of service
- Decide whether you'd like to have a viewing or visitation
- Choose a floral arrangement
- Select which photographs and memorabilia you'd like to display
- Consider any customs, traditions, or religious rites that are important to you and your family
- Choose the clothing you'd like to be dressed in
- Select music and hymns, if desired
- Select a style for your stationery and memorial register book
- Arrange transportation for your physical remains and your family
- Brainstorm any additional ways you'd like to personalize the services or pay tribute to your accomplishments, hobbies, personality, and life story.

### **Participants**

- Choose a clergy member or officiator to preside over the service
- Select any musicians whose talents you'd like to employ
- Select pallbearers
- Choose friends or family members to perform the eulogy, read scripture, or prepare a speech

### **Cemetery**

- Choose a cemetery
- Select a burial or cremation plot, or a mausoleum, if appropriate
- Decide between above- and below-ground burial
- Select a memorial or grave marker and inscription