

Funeral & Memorial Planning Guide



SHAFFER FUNERAL HOME

Making end of life a little easier

Funeral and Memorial Planning Guide

BY SHAFFER FUNERAL HOME

This booklet was personally prepared for:

This booklet contains a complete record of my final wishes as I would like them carried out. It also contains information that will be helpful in completing any necessary forms and closing accounts.

Signed X

Date

Witness X

Date

IMPORTANT:

Be sure to keep this booklet in a safe place as it contains sensitive information, but ensure it is available to whomever will be handling your final arrangements.

DO NOT KEEP IN A SAFE DEPOSIT BOX!!

To my family and friends:

I have prepared this booklet so that I may spare you from the many decisions that must be made upon my death.

Within this booklet, I have recorded my final wishes and ask you to take this to the funeral director I have named so that these requests may be fulfilled. This is not exhaustive, but it should be more than enough to most everything completed.

For your benefit, I have also listed the vital information that is required, along with a list of resources (account names, numbers, pins, passwords, etc).

By planning in advance, I hope to have lifted this burden from your shoulders.

All my love,

Vital Statistics

First Name

Middle Name

Last Name

Maiden Name or Nickname

Physical Address :

Mailing Address :

Date of Birth:

Place of Birth (City & State)

/ /

Social Security #:

Citizen of :

- -

Marital Status:

☐ Married ☐ Divorced ☐ Never Married ☐ Widowed

Spouse's Full (Maiden) Name

Occupation & Employer:

Highest Level of Education:

Father's Full Name

Mother's Full Name & Maiden Name

Military Service: ☐ Yes ☐ No

If yes, list Branch of Armed Forces, Years of Services, Rank, and Dates of Entry and Discharge

Funeral Preferences & Requests

Preferred Funeral Home/Funeral Director

City, State

Phone #:

I ☐ have ☐ have not made arrangements.

Person Responsible for Making Final Arrangements

Phone #:

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Final Disposition:

☐ Conventional Burial *Cemetery Name & Location_____

☐ Natural Burial *Cemetery Name & Location_____

☐ Cremation *Special instructions for my ashes:

☐ Body Donation *Preferred Organization _____

Investment and Banking Account Info for the estate of: _____

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT W OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

BANK	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

Insurance Policy Info for the estate of: _____

COMPANY	
POLICY #	
BENEFICIARY	
PW OR PIN	
NOTES	

COMPANY	
POLICY #	
BENEFICIARY	
PW OR PIN	
NOTES	

COMPANY	
POLICY #	
BENEFICIARY	
PW OR PIN	
NOTES	

COMPANY	
POLICY #	
BENEFICIARY	
PW OR PIN	
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BENEFICIARY	
PW OR PIN	
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POLICY #	
BENEFICIARY	
PW OR PIN	
NOTES	

COMPANY	
POLICY #	
BENEFICIARY	
PW OR PIN	
NOTES	



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Utility & other Debt Accounts for the estate of: _____

WATER	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

SEWER	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

MORTGAGE #1	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

MORTGAGE #2	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

ELECTRIC	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

INTERNET	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

HOME PHONE	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

CELL PHONE	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

Utility & other Debt Accounts for the estate of: _____

NATURAL GAS	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

DEBT #1	
ACCOUNT #	
TYPE	
PW OR PIN	
NOTES	

DEBT #2	
ACCOUNT #	
TYPE	
PW OR PIN	
NOTES	

DEBT #3	
ACCOUNT #	
TYPE	
PW OR PIN	
NOTES	

DEBT #4	
ACCOUNT #	
TYPE	
PW OR PIN	
NOTES	

DEBT #5	
ACCOUNT #	
TYPE	
PW OR PIN	
NOTES	

LAWN CARE	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	

OTHER	
ACCOUNT #	
CONTACT	
PW OR PIN	
NOTES	



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