



ADVANCE FUNERAL PLANNING WORK SHEET

Here is a Work Sheet that can be used to gather the information needed for your Advance Funeral Planning records.

It will be easier for your family if these details are kept all together in one place, perhaps in an envelope in a desk or another place of safe-keeping.

Simply print it out, fill it in, seal and mark it in an envelope, and inform a family member of its whereabouts.

If you have other documents or assets like a Will, a Life Insurance policy, or a CD with the music that you would like to be played at your Memorial Service, include these in the same location.

Personal Information:

- Your Name (first, middle, last):
- Date of Birth:
- Place of Birth:
- Address:
- City:
- State or Province:
- Country:
- Zip or Postal Code:
- Telephone:
- Email:
- Marital Status:
- Spouse's Name:
- Spouse's Maiden Name:

- Father's Name:
- Mother's Name:
- Mother's Maiden Name:
- Person in Charge of Funeral Decisions:
- Address:
- Phone:

Work, Education, Military History:

- Education (0 – 12):
- College or University (1 – 5+):
- Occupation:
- Business:
- Company:
- Military Branch of Service:
- Serial Number:
- Date Enlisted:
- Rank at Discharge:
- Date of Discharge:
- Discharge on File At:
- Copy of Discharge Papers (if yes, attached):
- Name of War(s):

Memorial Services Information:

- Place of Service:
- Funeral Home:
- Address:
- Phone:
- Place of Visitation:
- Religious Denomination:

- Place of Worship:
- Music I Would Like Played at My Funeral Service:
- CD Compilation (if you've compiled a CD of these selections, also note its whereabouts):

Newspaper Information:

- Newspaper(s) of Choice for Obituary:
- Spouse:
- Children:
- Brothers and Sisters:
- Grandchildren:
- List any other Significant Relatives:

Special Instructions:

- Life Insurance Policy Number (if Advance Planning includes this):
- Funeral Home Contact (if Pre-Need Plans have been made in this way):
- Bank Savings Account for Funeral Costs (if one has been set up for this):
- Estate Executor:

Disposition Preferences:

- I Prefer Earth Burial or Cremation:
- Cemetery or Columbarium Niche:
- Address:
- Phone:
- Scattering Location, if Preferred:
- I Have Made a Last Will & Testament:
- Location of Will:

Other Instructions:

Any Other Funeral or Memorial Services Information, Instructions or Preferences:

Memorials or Donations to Charity:

Decisions & Documents Time Chart:

Personal Information That is Needed Immediately:	To Be Arranged Within A Few Hours:	Payment Arrangements For:	Documents Needed:
<ul style="list-style-type: none"> • Social Security number or Social Insurance number • Date and Place of Birth • Occupation • Family and key contact telephone numbers • Military service number • Citizenship • Parents' names and places of birth 	<ul style="list-style-type: none"> • Cremation or burial? • Above or below ground? • Cemetery, Columbarium Niche, Scattering, Cremation Urn &/or Keepsakes to be kept by Loved One(s) • Funeral Home • Merchandise - casket, cremation urn, vault • Service - time, place, scriptures, music, flowers, etc. • Casket bearers, Urn bearers, Transportation 	<ul style="list-style-type: none"> • Cremation or Cemetery service and merchandise • Funeral • Service • Clergy • Florists • Clothing • Transportation • Medical and health care expenses 	<ul style="list-style-type: none"> • Will • Birth Certificate • Marriage License • Insurance - life, health, accident, house, car, funeral • Property Deeds • Auto Ownership • Income Tax returns • Military Discharge papers

Notes:

We hope this guide to **Advance Funeral Planning** has been useful. If you need further information, it can likely be found on our Cremation Info page, and with any other questions, please contact us at service@Cremation-Urns-Legacy.com.

