



FINAL ARRANGEMENTS

A Pre-Planning Guide

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INSURANCE

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Instructions

Date _____

Dear Loved One,

Realizing that death is inevitable, I have filled out this prearrangement booklet with my desires and other information that will help in arranging my memorial service.

In this booklet, you'll find information that will be required by the Funeral Director. I've also included details about other documents and important papers of which I want you to be aware.

When the need arises, give this folder to any Funeral Director to help in completing the final arrangements.

I sincerely hope these arrangements will be agreeable to you and will spare you needless concern, knowing that my memorial service was as I wished it.

First name	Middle	Last
Street address	City	State Zip
Birthplace: City	State	Birthplace: Month/Day/Year
Citizenship		
Resided in county	State	Lived here since
Marital status	Spouse name (include maiden name)	
Marriage: Date	Place	
Father's name and birthplace		
Mother's maiden name and birthplace		
Child's name	Birthplace	
Child's name	Birthplace	
Child's name	Birthplace	
Child's name	Birthplace	
Occupation	Employing company	
Type of business/industry	Since (year)	
Social security number		
Veteran/branch of service	Serial no.	
Name of war or dates served		
	Organization	Rank
	Enlisted at	Date
	Discharged at	Date
Location of discharge certificate		

PEOPLE TO NOTIFY

Immediate family member to contact/relationship			
Address	City	State	Zip
Telephone (including area code)		Email	
Immediate family member to contact/relationship			
Address	City	State	Zip
Telephone (including area code)		Email	

Friends who will assist the family:

Name	Telephone	Email	
Name	Telephone	Email	
Name	Telephone	Email	
Preference for immediate contact:			
Funeral arrangements counselor	Telephone	Email	
Address	City	State	Zip
Attorney	Telephone	Email	
Address	City	State	Zip
Accountant	Telephone	Email	
Address	City	State	Zip
Family Doctor	Telephone	Email	
Address	City	State	Zip

You will find my Last Will and Testament at: _____

You will find my birth certificate in: _____

My attorney is: _____

Location of safety deposit boxes and bankbooks for: _____

Life insurance	Company	Policy Number
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Hospital and medical insurance	Company	Policy Number
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Automobile insurance	Company	Policy Number
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Disability insurance	Company	Policy Number
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Others (unions or lodges): _____

I have bank deposits at the following banks: _____

I have appointed the following to be executor(trix) of my estate: _____

PERSONAL MEMORIAL INSTRUCTIONS

Place of funeral or memorial service Telephone

Religious affiliation Place of worship City State

Please Contact: ☐ Minister ☐ Priest ☐ Rabbi ☐ Other

Name Telephone Email

Address City State Zip

Participating organizations (military, fraternal, other)

Type of service:

Embalmed: ☐ open casket ☐ closed casket
Casket covering: ☐ flag - fold/place at head of casket/drape casket

Casket: metal/wood/fiberglass Interior color Exterior color

Outside vault or container

Cremation: ☐ Ashes present at service

Urn or container for ashes

Clothing:

Use from current wardrobe: ☐ yes ☐ no

Type of clothing

Type of jewelry

☐ stays on ☐ return jewelry to: _____

Wedding ring: ☐ stays on ☐ return ring to: _____

PERSONAL MEMORIAL INSTRUCTIONS

Music and Spoken Word:

☐ musician(s): ☐ pre-recorded music

Musical selections

Favorite passage from the Bible or other literature

Cemetery decisions:

Location of ownership certificate/deed for cemetery property

Name of cemetery

Address

City

State

Zip

Graveside service: ☐ yes ☐ no

Interment:

Prefer: ☒ mausoleum entombment ☐ lawn ☐ crypt ☐ collumbarium ☐ niche

Spaces

Actual description of cemetery property to be used

Crypt or space

Tier or lot

Mausoleum or lawn

Vault

Flower container

Memorial

Bronze/granite/other

Inscription

Emblem

INSTRUCTIONS

Flowers

Color and type preferred

Donations (instead of flowers) to:

Special instructions:

These are my instructions and memorial wishes.

Signed

Date

Witness

Date

Funeral director and professional services:

I'd like my policy be used to provide the following funeral services and merchandise:

Funeral director designation

☐ clothing ☐ casket ☐ cremation urn or container ☐ outside vault or container

Additional professional services:

Professional services

- First call from place of death
- Embalming and proper care of body
- Dressing
- Cosmetology and hairdressing
- Restorative work when necessary
- Use of mortuary & facilities
- Funeral coach
- Limousine for family use
- Car for pallbearers
- Visitation room
- Handling of floral offerings

General assistance

- Preparation of necessary papers
- Obtaining burial permit
- Notifying newspapers
- Furnishing acknowledgment cards
- Preparing social security forms
- Preparing insurance forms
- Preparing veterans forms
- Arranging for grave space
- Arranging for opening and closing grave

Information for memorial services, newspaper articles and online use:

Name _____

Born at _____

Date _____

Education _____

Married date _____

Place _____

Religious affiliation _____

Clubs or lodges _____

Military record _____

Information about employment _____

Other information _____

Surviving relatives (list names and relationships)

YOUR FUNERAL DIRECTOR

How the Funeral Director can help:

You'll need to contact a Funeral Director at the time of death. This is an expert licensed by the State Board. They'll have the training and knowledge needed to carry out the service defined in this guide.

You can speak with the Director to set the time and place of the service.

They can also help with tasks such as:

- Choosing a casket and clothing
- Making arrangements for musicians
- Contacting places of worship
- Arranging newspaper notices
- Getting certified copies of the death certificate

You can talk to your Director if you need your loved one moved to another place for burial. They'll set up a shipment by funeral coach, rail or air. And, you'll get guidance on the best and most cost-effective means of transport.

They will complete all legal work for the death certificate and Burial Permit. They can also advise you about Veterans Burial Allowance and Social Security Death Benefits.

This guide is furnished by:

Agent's name: _____

Address: _____

Phone number: _____

Email: _____

1. Notify:

- ☐ The doctor or coroner
- ☐ The funeral director
- ☐ The cemetery or memorial park
- ☐ The clergy and place of worship
- ☐ All relatives
- ☐ All friends
- ☐ Musician(s) for service
- ☐ Pallbearers
- ☐ Insurance agents/companies
- ☐ Unions and fraternal organizations
- ☐ Newspapers

2. Select:

(see Instructions on pages 6-8)

- ☐ Embalm
- ☐ Cremate
- ☐ Memorial estate and plot, if not already done
- ☐ Casket
- ☐ Vault or outer case
- ☐ Clothing
- ☐ Blanket or robe
- ☐ Flowers
- ☐ Music
- ☐ Food
- ☐ Furniture
- ☐ Time and place
- ☐ Transportation
- ☐ Thank you cards

3. Additional obligations

include:

- ☐ Providing vital statistics about deceased to the newspaper and person planning the service
- ☐ Preparing and signing necessary papers
- ☐ Providing addresses for all interested people who must be notified
- ☐ Answering phone calls, messages and letters
- ☐ Greeting friends and relatives who call
- ☐ Providing lodging for out-of-town guests
- ☐ Cleaning the home
- ☐ Planning funeral car list

4. Arrange payment for:

- ☐ Doctor
- ☐ Nurse
- ☐ Hospital
- ☐ Medicine
- ☐ Funeral
- ☐ Cemetery plot
- ☐ Interment service
- ☐ Clergy
- ☐ Musicians
- ☐ Florist
- ☐ Clothing
- ☐ Transportation
- ☐ Telephone
- ☐ Food
- ☐ Memorials



SAMPLE

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