



Funeral Planning Worksheet

Planning your funeral is one of the most important steps you can take to provide peace of mind for your family.

Use this form to document your wishes to relieve the stress of your loved ones during this difficult time.

Funeral Contact Preferences

List your top 3 options for funeral homes.

1.

2.

3.

Who is your next of kin?

Name

Number

Address

Type of Disposition

Burial

Cremation

Type of Service/Memorial

Traditional

Graveside

Cremation Service

Place of Service:

Church

Funeral Home

Cemetery

Religious Service:

Yes

No

Visitation/Wake:

Public

Private

None

Personalized Options

Own cemetery property: Yes No

Location of cemetery property:

Food at service: Catered meal Potluck Refreshments only

Personal mementos (photos or videos):

What music would you like played at the service? (specific songs, style of music, etc.)

What decor would you like at the service? (colors, flowers, etc.)

Is there any specific clothing or jewelry you would like incorporated in your final arrangements?

Place of Final Rest

Grave marker (headstone, ground plaque, etc.):

Casket choice: Good – Steel Better – Pine Best – Cherry/Oak

Scattered remains/cremation requests:

Cost and Payment

Do you have a life insurance policy? (average cost of a funeral in the United States is \$9,000)

Yes No

If you own life insurance, please list your policy details below.

Company Name:

Beneficiary:

Policy Number:

Face Amount:

Final Wishes Documentation

Make a voice recording/write a letter explaining your funeral preferences.

Location of preferences:

Create a funeral plan outline and give it to your family.

Location of outline:

Funeral Assistance

The government provides a \$255 death benefit to United States citizens.

If you are a veteran the government will provide a \$3,000 death benefit if the passing is service related.

If you are a veteran please list your details:

Which War: Serial Number:

Branch of Service: Rank:

If you are a veteran, would you like your flag draped or folded? Draped Folded

Additional Checklist

- Create one place to store all of your important documents including this worksheet and let someone know where they are.

Location of documents:

- Writing an obituary is difficult, but you can write your own beforehand to make it easier on friends and loved ones.

Location of obituary:

- List the newspapers you want your obituary to appear in.

- Create a list of people who you want to be notified including phone numbers and addresses.

Location of list:

- Make a list of the valuables in your home and where you'd like to see them go.

Location of list: