



FUNERAL PRE-PLANNING CHECKLIST

FINANCES AND PROPERTY

- ☐ Create a list of people who should be contacted in case of a medical emergency or death
- ☐ Give your executor(s) a copy of your will and the contact list
- ☐ Give your executor(s) a list bank/ investment accounts, creditors, mortgage, insurance policy, retirement plans, safe deposit, real and personal properties of value and all related phone numbers
- ☐ If you're receiving benefits from Social Security, Old Age Security or Veterans' Administration, your executor needs information to suspend payments.
- ☐ Select someone to control your online accounts (email, online memberships, social media, etc)

FUNERAL-RELATED DETAILS

- ☐ Note what you want in your obituary (or write your own)
- ☐ State in writing if you want burial or cremation
- ☐ If burial is preferred, choose a cemetery and casket, and purchase your burial plot
- ☐ If you chose cremation, what would you like done with your ashes?
- ☐ Would you like a traditional funeral, memorial service, or celebration of life?
- ☐ What location do you want your celebration of life and what activities do you want included?
- ☐ Decide what music or special readings you want
- ☐ Choose a type and color of flower
- ☐ Would you like to select a charitable organization to donate to in your name?
- ☐ If you're a veteran, would you like to receive full military honors as part of your service?

TAKING CARE OF YOUR PETS

- ☐ If you share your life with pets, you should think about who you would like to take care of them

FINAL PRE PLANNING CONSIDERATIONS

- ☐ Consider paying ahead of time for your funeral choices