

Final Arrangements Planning Guide

Prepared for: John Doe

**TO MY FAMILY AND
FRIENDS**

I am aware of the
emotional upset one may
experience at a time such
as this. So that I may
spare you any additional

Compliments of

John Smith - Nova Financial Services

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Hemet, CA 92544

(877) 353-6894

Personal Information

Full Name: _____

Address: _____

City: _____ State: _____ ZIP Code: _____

Phone: _____

Social Security Number: _____

Birthplace: _____

Date of Birth: _____

Marital Status: Married Single Divorced Widowed

If you are a Veteran, please complete this information:

Branch: _____ Rank: _____

Date Enlisted: _____ Date Discharged: _____

Memorial Wishes

I expect expenses for my Final Arrangements to total approximately \$ _____

and to consist of the following:

I would prefer:

Earth Burial - Type of Casket: Wood Metal Other _____

Cremation - Type of Urn: Wood Metal Other _____

Mausoleum/Entombment

Other _____

Place of Service / Memorial Chapel _____

City: _____ State: _____ ZIP Code: _____

Phone: _____

Cemetery _____ Plot already purchased

City: _____ State: _____ ZIP Code: _____

Phone _____

Please contact Officiant (Minister/Priest/Rabbi):

Name: _____

Address: _____

City: _____ State: _____ ZIP Code: _____

Phone: _____

Participating organization (Military or Fraternal) _____

Memorial Wishes (Cont.)

Casket - Open Closed

Flag: Yes No Fold/Place at head of casket Drape casket

Presented to: _____

Memorial: Bronze Granite Other _____

Inscription Requests: _____

Flowers: Yes No Color and Type preferred: _____

Donations (instead of flowers) to: _____

Clothing: _____ Use from current wardrobe: Yes No

Jewelry stays on Yes No Wedding ring stays on Yes No

or return ring to: _____

Special thoughts and wishes I would like to share with my loved ones:

These are my instructions and memorial wishes.

Signature: _____ Date: _____

Printed Name: _____

Checklist of Things to Do for Family and Friends

1. Notify:

- The doctor or coroner
- The funeral director
- The cemetery or memorial park
- The minister and church
- All relatives
- All friends
- Organist and soloist
- Pallbearers
- Insurance agents
- Unions and fraternal organizations
- Newspapers
- Food

2. Select:

- Memorial estate and plot
- Casket or urn
- Clothing
- Blanket or robe
- Flowers
- Music
- Food
- Furniture
- Time
- 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 and renovating the home
- Planning funeral car list

4. Arrange Payment for:

- Doctor
- Nurse
- Hospital
- Medicine and drugs
- Funeral
- Cemetery plot
- Interment service
- Minister
- Organist
- Clothing
- Transportation
- Memorials

5. Required Documents:

Obtain official copies of death certificate. A few possible uses are listed below. Check all that apply and list policy numbers and/or account numbers in space provided. You may list any additional information in the miscellaneous section at the bottom of the page.

- Close bank accounts
- Insurance purposes (policies)
- Social Security

6. Do you need to:

- Close accounts
- Contact creditors, i.e. mortgage company, auto finance company, credit card company
- Contact postal service to forward or cancel delivery of mail
- Miscellaneous / Other considerations:
