Nichols Bewley

CREMATIONS - FUNERALS - CELEBRATIONS

www.nicholsbewley.com

ALEDO: (309)582-3440 | MUSCATINE: (563)263-0842

PLANNING CHECKLIST

We extend our deepest condolences for your loss. To help us personalize your loved one's services and accurately handle all legal paperwork, we have compiled this checklist. Please review it and bring as many of these items and details as possible to our upcoming arrangement meeting.

If you are missing certain items, please do not worry—we will help you navigate the process every step of the way.

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1. Vital Statistics (Required for the Death Certificate)

The State requires highly accurate information to process the legal death certificate. Please have the following details ready:

- **[ ] Full Legal Name** (including maiden name, if applicable)
- **[ ] Social Security Number**
- **[ ] Date of Birth and City/State of Birth**
- **[ ] Current Residential Address**
- **[ ] Highest Level of Education Achieved**
- **[ ] Occupation & Industry Worked In** (even if retired)
- **[ ] Father's Full Name**
- **[ ] Mother's Full Name** (including maiden name)
- **[ ] Marital Status** (and spouse's full legal name, including maiden name)
- **[ ] Date and Location of Marriage**

2. Essential Documents & Forms

These records are critical for verifying benefits, honoring wishes, and confirming cemetery logistics:

- **[ ] Military Discharge Papers (Form DD-214):** Vital for securing military honors, a veterans cemetery plot, or a flag.
- **[ ] Existing Pre-Arrangement Documents:** If your loved one pre-planned or pre-funded their arrangements with any funeral home.
- **[ ] Life Insurance Policies:** Bring physical copies of policies if you intend to use them to fund the arrangements.
- **[ ] Cemetery Deed or Proof of Ownership:** If a burial plot, mausoleum crypt, or urn niche has already been purchased.

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3. Clothing and Personal Items

Whether you choose a traditional burial or cremation, we want to ensure your loved one looks natural and at peace:

- **[ ] Clothing:** A full set of clothes, **including undergarments** and socks/stockings. Long sleeves and high necklines are generally recommended.
- **[ ] Eyeglasses and Jewelry:** Indicate whether these items should remain with your loved one or be returned to the family before final disposition.
- **[ ] Recent Photograph:** A clear photo for our staff to use for cosmetic and hair preparation, as well as the primary photo for the online obituary and memorial tribute page.
- **[ ] Tribute Media:** 25–50 photographs, your funeral director will give you the link to upload the photos digitally if you would like a memorial video tribute

4. Obituary Details

It is helpful to start gathering these details:

- **[ ] Family Members:** Names of surviving relatives and predeceased relatives (spouse, children, grandchildren, parents, siblings). Also where they currently reside (City/State).
- **[ ] Life Highlights:** Key accomplishments, hobbies, organizational memberships, or military service branches.
- **[ ] Memorial Donations:** Preferred charities or organizations if you wish to suggest donations.

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5. Initial Service Preferences

We will discuss these options in detail during our meeting, but it can be helpful to begin thinking about them now:

- **[ ] Choice of Disposition:** Are you leaning toward **Burial** or **Cremation**?
- **[ ] Service Type:** Traditional funeral service, a memorial service (held without the body present), or a celebration of life?
- **[ ] Location:** Do you prefer using our funeral home chapel, a local place of worship, a graveside service or other meaningful venue?
- **[ ] Service Details:** Any specific clergy/officiant preferences, favorite scriptures, music selections, or pallbearer candidates.