

# A guide to funeral planning



## VITAL STATISTICS RECORD

Name (legal) \_\_\_\_\_ Date \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Phone \_\_\_\_\_ Social Security # \_\_\_\_\_

Email \_\_\_\_\_

Preferred method of communication ☐ Email ☐ Phone ☐ Text

Birthplace (city & state) \_\_\_\_\_ Birthdate \_\_\_\_\_

Father's Name \_\_\_\_\_

Mother's Maiden Name \_\_\_\_\_

Marital Status \_\_\_\_\_

Race/Ethnicity \_\_\_\_\_

## PERSONAL HISTORY

Occupation \_\_\_\_\_ Employer \_\_\_\_\_

Position Held \_\_\_\_\_ How Long \_\_\_\_\_ Retired (Y-N) Year \_\_\_\_\_

Resident Cities, Years \_\_\_\_\_

Education \_\_\_\_\_

Military: War \_\_\_\_\_ Branch \_\_\_\_\_ Rate or Rank at Discharge \_\_\_\_\_

Enlistment Date and Place \_\_\_\_\_ Discharge Date and Place \_\_\_\_\_

DD 214 on file ☐ Yes ☐ No County Recorded \_\_\_\_\_

Church, Public Office Held, Clubs, Hobbies, Interests, Fraternal Organizations \_\_\_\_\_

Newspaper: The funeral home will notify the local newspaper.

Other: \_\_\_\_\_

Funeral Home Website/Funeral Home Facebook Page: \_\_\_\_\_

## IMMEDIATE FAMILY

Name

Relationship

City & State

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Preceded In Death By: (include relationship)

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## EXECUTOR OF ESTATE

Name

Address

Phone

Email

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## IMPORTANT LEGAL INFORMATION FOR FAMILY USE

Will \_\_\_\_\_ Attorney \_\_\_\_\_

Living Will \_\_\_\_\_ Attorney \_\_\_\_\_

Safety deposit box at \_\_\_\_\_

Life Insurance Policies

Company

Amount

Policy Number

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## SOCIAL MEDIA PREFERENCE

☐ Set up memorial account ☐ Delete Account

# FUNERAL SERVICE INSTRUCTIONS AND INFORMATION

Method of disposition:

☐ Burial ☐ Cremation ☐ Donation ☐ Entombment ☐ Removal From State

Funeral/Memorial Service To Be Conducted:

☐ Funeral Home ☐ Church ☐ Event Center ☐ Graveside ☐ Other

☐ Prayer Service/rosary

Final Disposition:

Cemetery \_\_\_\_\_ Location \_\_\_\_\_

Section \_\_\_\_\_ Lot \_\_\_\_\_ Space \_\_\_\_\_ Marker Installed \_\_\_\_\_

☐ Scattering ☐ Mausoleum ☐ Niche ☐ Jewelry ☐ Artwork ☐ Keepsake Urn ☐ Other

Gathering or reception: ☐ Private ☐ Family & Friends ☐ Funeral Home ☐ Church

☐ Event Center ☐ Restaurant ☐ Other

Other Personalization Requests \_\_\_\_\_

☐ Clergy/Celebrant/Other \_\_\_\_\_

☐ Organist/Pianist/Other \_\_\_\_\_

☐ Other Musician \_\_\_\_\_

Music/Playlist \_\_\_\_\_

Favorite Bible Passages, Poetry, Quotations & Verses, etc. \_\_\_\_\_

Flower Requests \_\_\_\_\_

Jewelry \_\_\_\_\_ Rings \_\_\_\_\_ Earrings \_\_\_\_\_

Other \_\_\_\_\_

Jewelry: ☐ Bury ☐ Return To Family ☐ No Preference

Participating Organizations (Fraternal/Military Rites) \_\_\_\_\_

| Pallbearers: | Name | City | State |
|--------------|------|------|-------|
|--------------|------|------|-------|

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Memorial Contributions 1. \_\_\_\_\_

2. \_\_\_\_\_

Organ Donor ☐ Yes ☐ No

Other Special Requests \_\_\_\_\_