Pre-Arrangement Funeral Planning Checklist

# Personal Information & Documentation

☐ Gather personal details: full legal name, date of birth, place of birth, parents’ names, Social Security number

☐ Collect military discharge papers (DD-214 if a veteran)

☐ Locate marriage certificate(s) and birth certificate(s), if needed

☐ Prepare a list of immediate family, relatives, and close friends to be notified

# Funeral Service Planning

☐ Decide on burial, cremation, or other disposition

☐ Select cemetery property or mausoleum niche (if not already purchased)

☐ Choose casket, vault/outer container, or urn (if applicable)

☐ Select type of service: traditional funeral, memorial, graveside, or celebration of life

☐ Choose clergy/celebrant and type of religious or secular service

☐ Decide on service location (funeral home, church, graveside, other)

☐ Choose music, readings, poems, or special rituals

☐ Select pallbearers or honor participants

# Memorial & Personalization

☐ Prepare obituary/tribute information

☐ Decide on photographs, slideshow, or video memorials

☐ Select floral arrangements

☐ Choose keepsakes (prayer cards, memorial folders, bookmarks, jewelry, etc.)

☐ Plan reception/gathering (location, catering, refreshments)

# Financial & Legal

☐ Review or set up preneed funeral contract (guaranteed vs. non-guaranteed items)

☐ Set aside funds or prepay with funeral home

☐ Confirm payment method

☐ Review/prepare will, estate planning documents, and powers of attorney

# Notifications & Records

☐ Create a contact list of those to be informed immediately

☐ Decide on memorial donations (charities, organizations)

☐ Provide funeral home with emergency contact(s)

☐ Ensure funeral wishes are written down and copies given to family or attorney

# Final Review

☐ Review all selections with funeral director

☐ Confirm cemetery arrangements and opening/closing charges

☐ Sign necessary authorizations (cremation, embalming, preneed)

☐ Keep copies of all documents in a clearly labeled folder accessible to next of kin