

Peace of Mind **PLANNING KIT**



Your Kit Includes Five Important Guides

1. Self-Evaluation
What's Right for You?



**2. The 6 Most Frequently
Asked Questions**



**3. How to Compile
Your Personal Records**



4. Planning Ahead
What Steps to Take Now



5. Celebrating Life
Your Many Funeral Options

Please call us for a free private consultation, with no obligation.

Self-Evaluation

What's Right for You?

Should you choose Advance Funeral Planning? This self-evaluation tool can help you decide. Planning in advance lets you simplify the burden of decision-making for loved ones because you make all your funeral choices long before they're needed. Plus, you enjoy tremendous savings by planning ahead. Best of all, you can relax with the knowledge that everything is taken care of. Use this simple self-evaluation tool to find out if Advance Funeral Planning is right for you:

4 Easy Questions to Help You Decide

1. Consideration for Loved Ones

Do you want to record your preferences in advance to protect your loved ones from burdensome decisions during a time of emotional stress?

☐ Yes ☐ No

2. Choice and Control

Do you want to make your own memorial choices now when you have plenty of time to think and decide?

☐ Yes ☐ No

3. Saving Money

Do you want to save money by planning for your funeral costs in advance, and are you interested in flexible options to pay over time?

☐ Yes ☐ No

4. Peace of Mind

Would you feel more at peace knowing that everything is settled in advance and that your final affairs are in order?

☐ Yes ☐ No

**If you answered YES to even one of these questions,
then you owe it to yourself to learn more.**

Call us today for your free private conference.



The 6 Most Frequently Asked Questions *About Advance Funeral Planning*

1. What is Advance Funeral Planning?

Advance Funeral Planning simply means that you discuss, select and record your personal wishes with your funeral home provider long before the service is needed. This allows you to make your own choices and protects your loved ones from the burden of making difficult decisions during a time of emotional stress.

2. What are the benefits?

Advance Funeral Planning saves money, gives you control, and helps relieve a difficult burden from your loved ones. When you record your decisions in advance, your family feels relieved to know exactly what you want, and they won't feel obligated to overspend. You'll help preserve your family's financial assets and you'll feel peace of mind.

3. Can I afford It?

Yes. Flexible payment plans can be set up around any budget. You'll see the price list and choose the services you want, then pay for them over time. We'll be happy to explain all your options and give a detailed price quote, with absolutely no obligation. ***Simply*** call us.

4. What if I move?

Many people are not sure where they will end up living in the future. The good news is that your Advance Funeral Plan is 100% transferable to any funeral home in the country, and there is no transfer cost.

5. What if the funeral home shuts down?

Our funeral home is firmly established on a solid financial foundation, and we expect to remain in business for generations. But if the unlikely event of a shut-down should occur, your Advance Funeral Plan is 100% transferable to any funeral home in the country at no transfer cost.

6. Can I be denied based on my health?

Absolutely not. No one is denied based on health. Your Advance Funeral Plan will be in force from day one, and you can make payments over time.

Please call us if you have more questions.

How to Compile *Your Personal Records*

When a loved one is lost, many immediate tasks fall to the family, and one of the most difficult can be locating the loved one's personal records. These records are required for the official death certificate, the obituary, the eulogy, the settlement of your estate, and much more. You can help your family enormously by compiling your records now while you have plenty of time. This handy check-list is a starting point:

Personal Records Checklist

Your Vital Statistics

- Date and place of birth
- Social Security number
- Marital status
- Vital Statistics of your spouse
- Schools attended
- Degrees earned with dates
- Religious membership
- Names of parents, siblings, children, grandchildren, great-grandchildren and other significant relatives
- Location of birth certificate, marriage certificate, social security card, insurance policies, tax records, and other vital documents

Your Employment History

- Occupation
- Current employer with starting date
- List of past employers with dates
- Occupational achievements and awards

Your Military Records

- Branch of service
- Service number
- Date of entry and discharge
- Location of discharge papers
- War/conflict service with dates
- Highest grade, rank or rating
- Military honors and awards

There may be other records to consider as well, and we can help. We'll work with you to compile and record your information so that when the time comes, your family's task is easy. This service is free, so please call us.

Get FREE help with your personal records. *Call us today.*



Planning Ahead

What Steps to Take Now

There is no better feeling than having important tasks completed ahead of time, and the sooner you start, the more relaxed you'll feel. Your Advance Funeral Plan is an essential part of your affairs, but there are many other aspects to consider as well. This guide will help:

1. Write Down Your Contact List

Make a list of all the people who should be notified in the event of your death. This might include friends, neighbors, employers, your attorney, your religious advisor, and so on. Include phone numbers, addresses and email addresses. This will be invaluable to your family.

2. Update Your Will

If you have not yet made a will, now is the time. Your attorney can customize your will to fit your unique situation. Or, you can make a very basic will yourself. Much information is available free to the public, so visit your local library, or search the internet. Equally important, you should review your will often and keep it up to date.

3. Select Your Executor

Your executor is the person you appoint to carry out the terms of your will. You can appoint co-executors, or even an institution. Obviously, your executor should be trustworthy, honest and experienced in financial matters. Think carefully about this decision. It's wise to get the advice of an attorney.

4. Consider a Living Will

A living will is a written statement of your desires about medical treatment if you should no longer be able to express your thoughts. For instance, in what circumstances would you want life support? Whatever your desires, a living will relieves your family of what might be painful decisions. Ask your doctor for advice about a living will.

5. Consider a Power Of Attorney

A Power of Attorney (POA) is a written document in which you appoint another person to act on your behalf in certain matters, for instance, legal, financial, or health care. POAs can be limited in various ways, and they can sometimes prove extremely useful. You'll need the advice of an attorney to decide if a POA is right for you.

We're here to help. *Call us anytime.*

6. Make a List of Your Property, Assets & Debts

This list will be an immense help to your family and the executor of your will. Of course, you will need to review this list each year and keep it up to date. Note: be sure to keep this list in a secure place, such as a safety deposit box.

- ✓ **Real Estate**—List all your real estate, including addresses and locations of deeds. Include recent appraisals and property tax records.
- ✓ **Personal Property**—List valuable personal property such as artwork, antiques, jewelry and family heirlooms, along with their locations. Include any recent appraisals.
- ✓ **Financial Assets**—List all bank and brokerage accounts and other financial assets, along with account numbers and contact information.
- ✓ **Debts**—List all debts you owe, including mortgages or other bank loans, credit card accounts, and current tax debts. Include account numbers and contact information.

7. Organize Your Tax Records

Maintain a file of your tax records going back at least three years. Be sure all information needed for the current tax year is included as well. If applicable, include the name and contact information of the person who prepares your tax filings.

8. Review Your Insurance Policies

List the location of all your insurance policies. For instance, if you store them in a safety deposit box, list the bank name and box number. Also list any insurance agents you may have. Each year, review your insurance policies to make sure your coverage is up to date.

9. Finalize Your Advance Funeral Plan

Call us for a free private conference, where you'll see all the services available to you along with the costs. Based on your choices, we will calculate a firm price quote, and present you with all the flexible payment options that are available. You'll rest easy knowing you've relieved your family of many difficult decisions, and that your wishes will be carried out.



*What a good feeling to
have everything settled!*



Celebrating Life

Your Many Funeral Options

A Funeral is a Celebration of Life

When a loved one is lost, it's important to find healing by gathering together, sharing memories and celebrating a life well lived. Whether simple or elaborate, your personal funeral wishes are essential, and you have many choices for your service. Your professional funeral director can help you decide and plan.

Planning a funeral in advance is an act of love, because it relieves a stressful burden from your family. *What are your personal wishes?*

- ✓ Location
- ✓ Visitation
- ✓ Open or closed casket
- ✓ Photos and other personal effects
- ✓ Music
- ✓ Main speaker
- ✓ Sacred text, poetry or other reading
- ✓ Family or friends involvement
- ✓ Memorials and charity donations
- ✓ Monument inscription
- ✓ Other special wishes

Traditional burial or cremation? It's purely an individual choice.

Both traditional burial and cremation are respectful, dignified services. Either choice can also include a full funeral service with visitation, open or closed casket, memorial ceremony, graveside tribute, and commemorative monument.

When the choice is cremation the family receives the loved one's remains in a sealed container, which can then be buried, placed in a niche inside a columbarium, taken home, or transported for scattering. Additionally, the cremated remains can be separated and placed into multiple urns or keepsakes or even jewelry specifically designed as a final resting place.

A meaningful celebration of life allows everyone the peace and comfort to heal.

We can help you plan.
Call today for your free private conference.

Scan code above to schedule a pre-planning appointment.



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Please call us for a free private consultation, with no obligation.