PART ONE · PLAN AHEAD

The Whole Thing on One Page

Everything in this guide, on a single page. Check things off as you gather and decide — Part Two walks you through each one with room to write. This page is the map.

Gather — the facts

- ☐ Full name, home address, and phone number
- ☐ Date and place of birth
- ☐ Social Security number
- ☐ Employer, occupation, and years worked
- ☐ Father's name and birthplace
- ☐ Mother's maiden name and birthplace
- ☐ Spouse or partner's information
- ☐ Military service, and where the discharge papers are
- ☐ Where the will is kept
- ☐ Where insurance policies are kept
- ☐ Where deeds and bank information are kept
- ☐ Marriage certificate, and where it is kept

Decide — the choices

- ☐ Funeral service, or memorial service
- ☐ Burial, or cremation
- ☐ Visitation and a reception, or neither
- ☐ Music and readings
- ☐ Pallbearers
- ☐ Clergy or officiant
- ☐ Casket or urn
- ☐ Vault, and cemetery property
- ☐ Monument or marker
- ☐ Flowers
- ☐ Charitable donations in place of flowers
- ☐ Record wishes only — or fund it with insurance, at once or over time

Then tell somebody

A plan only helps if your family knows it exists. Tell them where your copy of this guide is kept, and let them know a copy is on file with us.