

Pre-Need Funeral Planning Checklist

1. Personal Information & Documentation

- Full legal name
- Social Security number
- Birth certificate location
- Marriage certificate (if applicable)
- Military service records (DD-214 for veterans)
- Will and estate planning documents
- Power of Attorney and healthcare directive
- Contact list of immediate family members and key individuals

2. Funeral Home & Service Arrangements

- Choose a funeral home and director
- Determine burial or cremation preference
- Select a casket, urn, or burial vault
- Choose burial plot or columbarium niche
- Arrange transportation for the deceased and family
- Set up pre-need funeral contract or payment plan

3. Ceremony & Service Preferences

- Type of service (traditional, graveside, memorial, celebration of life)
- Location of the service (church, funeral home, cemetery, other)
- Select an officiant (priest, pastor, celebrant, etc.)
- List of pallbearers (if applicable)
- Music, hymns, or songs selection
- Readings, scriptures, or poems to be included
- Eulogists and speakers
- Floral arrangements and decorations
- Memorial slideshow or tribute video

4. Burial or Cremation Details

- Select cemetery and finalize plot details
- Choose a headstone or grave marker
- Inscription and epitaph preferences
- Cremation service provider (if applicable)
- Ashes storage or scattering location
- Obtain necessary permits for burial or cremation

5. Financial Planning & Pre-Payment

- Funeral insurance policy or final expense insurance
- Pre-paid funeral plan details
- Savings or bank account dedicated to funeral expenses
- Veteran or government benefits eligibility
- Employer or union benefits for funeral assistance

6. Legal & Estate Considerations

- Will and testament finalized
- Executor of the estate designated
- Digital assets and social media accounts handled

- Beneficiaries and financial accounts updated

7. Notifications & Obituary

- Draft an obituary with personal details
- Choose a publication (newspaper, online memorial, social media)
- Notify friends, extended family, and colleagues
- Arrange for thank-you notes for those offering condolences

8. Personal Preferences & Final Wishes

- Clothing for burial or cremation
- Special items to be placed in casket (if desired)
- Charitable donations in lieu of flowers
- Instructions for the reception or gathering

9. Important Contact Information

- **Funeral home and director:** _____
- **Lawyer or estate planner:** _____
- **Executor of the will:** _____
- **Cemetery contact:** _____
- **Family representative:** _____