

## Preplanning Checklist

The following checklist will help you create your personalized plan.

### Ways in which you can plan ahead:

#### General

- Identify the responsible survivor to carry out your wishes
- Make note of any special instructions you desire for your services and final disposition
- Gather personal information for your obituary

#### Funeral or Memorial Service

- Choose burial or cremation
- Choose the location and type of service
- Decide whether you'd like to have a viewing or visitation
- Select a casket or cremation container, and possibly an urn
- Select which photographs and memorabilia you'd like to display
- Consider any customs, traditions, or religious rites that are important to you and your family
- Choose the clothing you'd like to be dressed in
- Select music and hymns, if desired
- Select photographs and a design for your stationery and memorial register book

- Brainstorm any additional ways you'd like to personalize the services or pay tribute to your accomplishments, hobbies, personality, and life story.

## Participants

- Choose a clergy member or officiator to preside over the service
- Select any musicians whose talents you'd like to employ
- Select casket bearers
- Choose friends or family members to perform the eulogy, read scripture, or prepare a tribute

## For Burial

- Choose a cemetery (your funeral director can help guide you)
- Consider if you would like an upright headstone or a flat memorial
- Choose a burial plot, or space in a mausoleum
- Select the design and inscriptions for the grave marker

## For Cremation

- Consider the many options for the final disposition of the cremated remains
- Most cemeteries have burial spaces and columbaria for urns, or scattering gardens for cremated remains
- For scattering of cremated remains outside a cemetery, determine who will do this and where
- Determine if your loved one wishes to keep the urn at home

Information you'll need to assemble:

### Vital Statistics

This includes your father's name, your mother's maiden name, their places of birth, your social insurance number, health care number and driver's license number.

### Affiliations

This includes organizations, teams, service clubs, union memberships and/or other groups, along with any special recognitions you might have.

Remember that there's no need to make all of the decisions right away, and that the purpose of pre-planning is to allow yourself to take the time you need when considering your options and making the choices that are right for you. For personalized assistance in creating your plan, consult one of our experts by contacting us to schedule a one-on-one meeting.