

# FUNERAL PRE-PLANNING

In many cases, discussing ones own funeral and the planning that goes with it, is a very difficult thing to talk about and put down on paper, understandably so. But in the vast majority of cases, when the pre-planning process is complete, it will give you peace of mind knowing that you have eased this burden for your loved ones. Furthermore, by putting your ideas in writing, your family will know your true wishes. It also gives you and your loved ones the time to organize important information, instead of having to do this at the time of death, when their thoughts are not always clear. This booklet is designed to assist you and your family with compiling pertinent information such as vital statistic facts, obituary information, your funeral preferences, and some financial information. We hope this booklet will help you and your loved ones take the time to think over your ideas and feelings regarding your particular funeral service, the many decisions that go into planning a funeral, and the details that are to be taken care of after a funeral has taken place.

Please keep this booklet in a place where it is easily accessible to anyone that will need it, and let your family know where it will be. We would be glad to keep it on file at the funeral home if you so desire, with its contents kept confidential, and it is yours to have back at your request.

Thank you for taking the time to go through this information. If you wish to come to the funeral home to discuss this or any other information, please let us know. At that time, if you so desire, you can look at our selection of caskets, burial vaults, and other merchandise that we have available. We can also discuss funeral-funding options if you wish. If you have any questions or concerns, please feel free to give us a call anytime.

Sincerely,

Ron Mueller    Kelly Angell





STOCKS AND BONDS:

Name of Stock(s): \_\_\_\_\_

Owner: \_\_\_\_\_

Broker: \_\_\_\_\_

Name of Stock(s): \_\_\_\_\_

Owner: \_\_\_\_\_

Broker: \_\_\_\_\_

Name of Stock(s): \_\_\_\_\_

Owner: \_\_\_\_\_

Broker: \_\_\_\_\_

BANK ACCOUNTS:

Where: \_\_\_\_\_

Account #: \_\_\_\_\_

Where: \_\_\_\_\_

Account #: \_\_\_\_\_

PENSION PLAN: \_\_\_\_\_

REAL ESTATE: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

SAFE DEPOSIT BOX(ES): \_\_\_\_\_

ATTORNEY: \_\_\_\_\_

EXECUTOR OF ESTATE: \_\_\_\_\_

\_\_\_\_\_

# PERSONAL INFORMATION

## BIOGRAPHICAL INFORMATION:

Full Name: \_\_\_\_\_

Maiden Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Village/Town/City: \_\_\_\_\_

Telephone #: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Birthplace: \_\_\_\_\_

Father's Name: \_\_\_\_\_

Mother's Name: \_\_\_\_\_

Mother's Maiden Name: \_\_\_\_\_

Education: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Marital Status: \_\_\_\_\_

Married to Whom: (Spouses Maiden Name) \_\_\_\_\_

Date and Place of Marriage: \_\_\_\_\_

## MILITARY INFORMATION:

If Veteran, Name of War: \_\_\_\_\_

Branch of Service: \_\_\_\_\_

Rank: \_\_\_\_\_

Date Enlisted: \_\_\_\_\_ Date Discharged: \_\_\_\_\_

Service Serial #: \_\_\_\_\_

EMPLOYMENT HISTORY: \_\_\_\_\_

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CHURCH AFFILIATION: \_\_\_\_\_

CLUBS AND ORGANIZATIONS: \_\_\_\_\_

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HOBBIES AND ACTIVITIES: \_\_\_\_\_

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SPECIAL ACHIEVEMENTS OR RECOGNITION: \_\_\_\_\_

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OTHER OBITUARY INFORMATION: \_\_\_\_\_

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# FINANCIAL INFORMATION

## LOCATION OF IMPORTANT DOCUMENTS:

Will: \_\_\_\_\_

Discharge Papers: \_\_\_\_\_

Deeds and Titles: \_\_\_\_\_

Marriage Certificate: \_\_\_\_\_

Birth Certificate: \_\_\_\_\_

Stocks and Bonds: \_\_\_\_\_

Insurance Policies: \_\_\_\_\_

Funeral Trusts: \_\_\_\_\_

Other Documents: \_\_\_\_\_

## INSURANCE POLICIES:

Company: \_\_\_\_\_

Policy #: \_\_\_\_\_

Company: \_\_\_\_\_

Policy #: \_\_\_\_\_

Company: \_\_\_\_\_

Policy #: \_\_\_\_\_

Company: \_\_\_\_\_

Policy #: \_\_\_\_\_

MEMORIAL FUNDS (If Any): \_\_\_\_\_

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FLOWERS (Type and Colors): \_\_\_\_\_

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INSTRUCTIONS FOR CLOTHING, JEWELRY, ETC: \_\_\_\_\_

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NAME AND LOCATION OF CEMETERY (Lot, Section, Grave): \_\_\_\_\_

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MONUMENT/MARKER: \_\_\_\_\_

NEWSPAPERS OBITUARY IS TO PUBLISHED IN: \_\_\_\_\_

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OTHER INSTRUCTIONS OR REQUESTS: \_\_\_\_\_

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# FUNERAL SERVICE PREFERENCES

PLACE OF SERVICE: \_\_\_\_\_

OFFICIATING CLERGY: \_\_\_\_\_

SCRIPTURE OR OTHER READINGS: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

MUSICAL SELECTIONS: \_\_\_\_\_

\_\_\_\_\_

ORGANIST/VOCALIST/OTHER MUSICIANS: \_\_\_\_\_

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ACTIVE PALLBEARERS: \_\_\_\_\_

\_\_\_\_\_

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HONORARY PALLBEARERS: \_\_\_\_\_

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VISITATION (Place and Any Other Requests): \_\_\_\_\_

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