

100 Planning Steps For Peace of Mind

This checklist covers steps to take now, and also actions you will need to take at the time of the death of a loved one. It is intended to help spare unnecessary confusion, expense, grief and suffering.

When a Death Occurs Follow These Principles

- Reach out and realize that you are not alone. Call immediate family, and close friends, and rely upon them.
- Make time to think about the things that you want and need at this time.
- Seek help from professionals – doctors, funeral directors, clergy, attorney, accountant and financial advisors.
- Take care of the deceased, but also remember to take care of yourself.
- Don't rush. Take time to be with yourself, and those who can help be of support to you.
- When you are ready, consult and take part in decision-making and exercising your choices.
- Act within the limits of your emotional and financial capacities.
- Organize calmly, and execute systematically.

A. Collect information about the person for whom you are planning the funeral

1. Name, current address, telephone number
2. Name of business, address, telephone number
3. Occupation, title
4. Social security number
5. Date and place of birth
6. Duration of stay in state
7. Citizenship and passport number
8. War veteran's service number
9. Father's name and birth place, religious and nicknames
10. Mother's maiden name and birth place, religious and nicknames
11. Complete enclosed disposition instructions*

B. Collect other information and document your decision (update as necessary)

12. Preneed wishes
13. Budget for funeral and prepayment plan
14. Telephone numbers and addresses of family members and close friends
15. Telephone numbers and addresses of family physician, funeral director and clergy
16. Selection of cemetery plot/crematory, choice of services and goods

C. Collect documents

17. Will
18. Living will, advance directive
19. Birth certificate
20. Passport or immigration and naturalization certificate
21. Social security card
22. Driver's license
23. Marriage license
24. Insurance policies – health, life, accident, disability, real estate, flood, professional liability
25. Bank books – checking, saving, breakage, loan accounts
26. Property deeds – real estate

27. Bill of sales, registration – cars, boats, other
28. Tax returns, cancelled checks, payment receipts
29. Certificate of ownership, contract – cemetery plot, mausoleum
30. Veteran’s discharge certificate
31. Claims documents – disability, workman’s comp
32. Credit cards
33. Keys – house, office, safe deposit
34. Information brochure – see #11

D. Document payments and debts

35. Taxes – federal, state, local
36. Credit cards
37. Mortgage, rent – home, office, condo
38. Loans – car, boat
39. Cemetery plot, mausoleum, memorials
40. Casket, vault, grave market
41. Interment services – opening and closing of grave
42. Funeral services, goods
43. Clergy honoraria
44. Florist, music, independent services
45. Telephones, telegraphs, express mail
46. Doctors, pharmacists, hospitals, dentist
47. Insurance – health, other
48. Gardner, pool man, veterinarian, etc.

Actions Before/At Death

A. Notify necessary people, ideally before death occurs

49. Immediate family, close friends – see item 14
50. Family physician, paramedic
51. Medical examiner – if unexplained causes
52. Funeral director
53. Clergy
54. Cemetery representative
55. Employer of deceased
56. Pallbearers
57. Musicians
58. Financial Advisor and/or Insurance Agents
59. Veterans administration, fraternity, union representative
60. Accountant, attorney
61. Executor of estate
62. Banks, creditors
63. Newspaper

B. More to decide and arrange for before death occurs

64. Informing relatives, friends and coworkers
65. Assignment of relaying notification
66. Meeting with funeral director, visiting funeral home
67. Selection of cemetery, plot cremation
68. Memorial type, inscription
69. Embalming, autopsy, cosmetics
70. Casket, vault, grave market
71. Mausoleum, crypt
72. Clothing for deceased, family
73. Clergy
74. Time, place of service – home, church, synagogue

75. Type of service – religious, military, fraternal
76. Scripture, music
77. Flowers
78. Charitable organizations for donations
79. Eulogies, prayers
80. Pallbearers
81. Food, transportation for family and guests
82. Death certificate, burial or cremation permits
83. Children, pets
84. Lodging for out of town guests
85. Information for newspaper
86. Responding to e-mails, letters
87. Responding to persons sending tributes, flowers, food, etc.
88. Invitations, guest book, printed order of service, printed prayer and thank you cards
89. Funeral protocol – viewing, visitation, seating, processions, cars, flowers, limousines, drivers
90. Audio video recording
91. Disposition of flowers
92. Gifts to clergy, out of pocket expenses
93. Shipping of remains if necessary
94. Notification of landlord, utilities, post office if deceased lived alone
95. Cleaning service or help from relatives, friends...

After the Funeral

96. Copies of death certificate and application of death benefits
97. Remains disposal; choosing headstone or marker to memorialize; selection of mausoleum
98. Meetings with attorney to handle probate, insurance agent/financial advisor to handle policies
99. Debts, installments payments; notify bank if SS payments are automatically deposited
100. Counseling for grief management

For an editable Word version of this document – please contact Paul Bonapart at Financial Security Planning Service, Inc., www.FinancialSecurityPlanning.com. Thank you.

Adapted by Howard Kramer, from the book *At Journey's End, The Complete Guide to Funerals and Funeral Planning* by Abdullah Fatteh, M.D., Ph.D., LL.B. and Naaz Fatteh, M.D.

Disposition Instructions

I. Important Information

Name: _____

Address _____

Telephone number _____

Date of Birth _____ Place of Birth _____

Date of Death _____ Place of Death _____

Social Security number: _____

Spouse

Name: _____

Address _____

Telephone number _____

Date of Birth _____ Place of Birth _____

Date of Death _____ Place of Death _____

Social Security number: _____

Executor of Estate

Name: _____

Address _____

Telephone number _____

II. Who to Notify Upon Death – Family, Friends & Advisors

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Name: _____

Address: _____

Telephone number: _____

Attorney

Name: _____

Address: _____

Telephone number: _____

Financial Advisor

Name: _____

Address: _____

Telephone number: _____

Funeral Director

Name: _____

Address: _____

Telephone number: _____

III. Disposition of Body

A. Burial

- _____ Immediate, without viewing
- _____ Embalming (unless required by law)
- _____ After viewing, with embalming
- _____ After embalming and viewing
- _____ After embalming, viewing, and service

Cemetery address: _____

Plot location: _____

Cemetery plot deed location: _____

- _____ Burial in mausoleum
- _____ Grave marker Flat Erect
- _____ Epitaph to read

B. Cremation

- _____ Direct without viewing, ceremony, embalming
- _____ After viewing without embalming
- _____ After embalming, viewing and services
- _____ After removal of donated organs
- _____ After removal of organs and viewing
- _____ After removal of organs, embalming, viewing
- _____ After study of donated body
- _____ Disposition of remains
 - Urn Mausoleum Earth Sea/River Home Ground Burial
 - Location: _____

C. Donation

- Donation of whole body to: _____
- _____ Donation of whole body after death
 - _____ Donation of whole body after services
 - _____ Donation of following organs:
 - Corneas Heart Lungs Liver Pancreas Skin Bone
 - Other: _____

Location of organ donor card: _____

Body donated to: _____

Organs donated to: _____

D. Funeral

- _____ Wake address: _____
- _____ Wake service: River Open casket Flowers River Closed casket Charities
- _____ Funeral Service address: _____
 - Church Synagogue Home

_____ Memorial service without body address: _____

_____ Service at Mausoleum: _____

_____ Service at Cemetery address: _____

_____ Cremation address: _____