

Peace of Mind planning kit

Five Important Guides & A Planning Checklist



1. Self-Evaluation *What's Right for You?*



2. The 6 Most Frequently Asked Questions The More You Know



3. How to Compile *Your Personal Records*



4. Planning Ahead *What Steps to Take Now*



5. Celebrating Life Your Many Funeral Options

Funeral Preplanning Checklist	
1. Begin the conversation ☐ Talk with family about your wishes ☐ Ask your loved ones to be a part of the process ☐ Talk with friends to get their experience with preplanning	2. Choose a funeral home ☐ Research local funeral homes ☐ Compare costs, services, and reputation ☐ Select a provider that aligns with your values and/or experiences
3. Decide on the type of service and disposition ☐ Traditional funeral ☐ Memorial service ☐ Celebration of life ☐ Religious or non-religious ceremony ☐ Location (funeral home or church)	4. Select final disposition ☐ Burial, choose cemetery, plot & marker ☐ Cremation, decide on urn, scattering, or placement ☐ Donation after traditional funeral
5. Plan the details ☐ Clergy, officiant or celebrant ☐ Readings, music, poems, or prayers ☐ Speakers/tributes ☐ Visitation or viewing preferences ☐ Clothing/greeter/guests	6. Choose your funeral merchandise ☐ Casket ☐ Head ☐ Urn/urn holder ☐ Coffin ☐ Shroud ☐ Registry book and Memorial cards

6. Planning Checklist & Biographical Form *Check It Off Your List*

Please call us for a free private consultation, with no obligation.



Self-Evaluation What's Right for You?

Should you choose Advance Funeral Planning? This self-evaluation tool can help you decide. Planning in advance lets you simplify the burden of decision-making for loved ones by making all your funeral choices long before they're needed. Plus, you enjoy tremendous savings by locking in today's prices. Best of all, you can relax knowing everything is taken care of. Use this simple self-evaluation tool to find out if advance funeral planning is right for you:

4 Easy Questions to Help You Decide

1. Consideration for Loved Ones

Do you want to record your preferences in advance to protect your loved ones from burdensome decisions during a time of emotional stress?

☐ YES ☐ NO

2. Choice and Control

Do you want to make your own memorial choices now, when you have plenty of time to think and decide?

☐ YES ☐ NO

3. Saving Money

Do you want to save money by guaranteeing your funeral costs at today's price, and are you interested in flexible options to pay over time?

☐ YES ☐ NO

4. Peace of Mind

Would you feel more at peace knowing that everything is settled in advance and that your final affairs are in order?

☐ YES ☐ NO

**If you answered YES to even one of these questions, then
you owe it to yourself to learn more.**

Call us today for your free private conference.



The 6 Most Frequently Asked Questions About Advance Funeral Planning

1. What is Advance Funeral Planning?

Advance funeral planning simply means discussing, selecting, and recording your personal wishes with your funeral home provider long before the service is needed. This allows you to make your own choices and guarantee your funeral costs at today's prices, eliminating inflation. Then you can pay over time, or all at once if you prefer.

2. What are the benefits?

Advance funeral planning saves money, gives you control, and helps relieve a difficult burden from your loved ones. When you record your decisions in advance, your family feels at peace knowing exactly what you want, and they won't feel obligated to overspend. You'll preserve your family's financial assets by guaranteeing today's price.

3. Can I afford It?

Yes. Flexible payment plans can be set up around any budget. You'll see the price list, choose the services you want, and pay for them over time. Plus, we guarantee your costs on the day you set up your plan, so your loved ones will not be harmed by inflation. Give us a call, and we will be happy to explain all your options and give a detailed price quote, with absolutely no obligation.

4. What if I move?

Many people are not sure where they will end up living in the future. The good news is your advance funeral plan is 100% transferable. You own the policy and take it with you wherever you go.

5. What if the funeral home shuts down?

Our funeral home is firmly established on a solid financial foundation, and we expect to remain in business for generations. However, if the unlikely event we are not here, your advance funeral plan is 100% transferable to any funeral home in the country.

6. Can I be denied based on my health.

Absolutely not. No one is denied based on health. Your advance funeral plan will be in force from day one, and provide coverage the entire time you are paying for your plan. The sooner you act, the more protected you will be.

Please call us if you have more questions.

A close-up photograph of a person's hand holding a white document. The document has the words "FUNERAL PLAN" printed in large, bold, black capital letters. The hand is visible on the left side of the frame, holding the top edge of the document. The background is a soft, out-of-focus green.

FUNERAL PLAN

How to Compile Your Personal Records

When a loved one is lost, many immediate tasks fall to the family, and one of the most difficult tasks can be locating the loved one's personal records. These records are required for the official death certificate, the obituary, the eulogy, the settlement of your estate, and much more. You can help your family enormously by compiling your records now while you have plenty of time. This handy check-list is a starting point:

Personal Records Checklist

Your Vital Statistics

- Date and place of birth
- Social Security number
- Marital status
- Vital Statistics of your spouse
- Schools attended
- Degrees earned with dates
- Religious membership
- Names of parents, siblings, children, grandchildren, great-grandchildren, and other significant relatives
- Location of birth certificate, marriage certificate, social security card, insurance policies, tax records, and other vital documents

Your Employment History

- Occupation Current employer with starting date
- List of past employers with dates
- Occupational achievements and awards

Your Military Records

- Branch of service
- Service number
- Date of entry and discharge
- Location of discharge papers
- War/conflict service with dates
- Highest grade, rank or rating
- Military honors and awards

There may be other records to consider as well, and we can help. We'll work with you to compile and record your information so that when the time comes, your family's task is easy. This service is free, so please call us.

Get FREE help with your personal records. Call us today.



Planning Ahead What Steps to Take Now?

There is no better feeling than completing important tasks ahead of time, and the sooner you start, the more relaxed you'll feel. Your Advance Funeral Plan is an essential part of your affairs, but there are many other aspects to consider as well. This guide will help:

1. Discuss and Complete Your Advance Funeral Plans

Schedule a free, private consultation to review your service options and costs. We'll prepare a personalized quote and help you lock in today's prices. You'll have peace of mind knowing your family is protected from hard decisions and your wishes are clearly documented.

2. Write Down Your Contact List

Make a list of all the people who should be notified at your death. This might include friends, neighbors, employers, your attorney, your religious advisor, and so on. Include phone numbers, addresses, and email addresses. This will be invaluable to your family.

3. Update Your Will

If you don't yet have a will, now is the time to take that step. You can work with an attorney to personalize it to your needs or use free tools available through libraries and online resources. Be sure to review and update your will regularly to keep it current.

4. Select Your Executor

Your executor is the person or organization you name to manage and settle your estate according to your will. You may choose one or more executors, or an institution if preferred. Select someone you trust who is financially responsible, and consider consulting an attorney before making this important decision.

5. Consider a Living Will

A living will documents your medical treatment preferences if you become unable to communicate them. It can include your wishes about life support and other care decisions. This guidance helps ease the emotional burden on your family, and your doctor can provide valuable advice when creating one.

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We're here to help. Call us anytime.

6. Consider a Power Of Attorney

A Power Of Attorney (P.O.A.) is a written document in which you appoint another person to act on your behalf in certain matters, for instance, legal, financial, or health care. P.O.A.s can be limited in various ways, and they can sometimes prove extremely useful. You'll need the advice of an attorney to decide if a P.O.A. is right for you.

7. Make a List of Your Property, Assets & Debts

This list is a gift to your loved ones and to the person responsible for carrying out your wishes. By reviewing it each year and keeping it up to date, you help spare them unnecessary stress. Store it in a secure place, such as a safe deposit box, for safekeeping.

- Real Estate—List all your real estate, including addresses and locations of deeds. Include recent appraisals and property tax records.
- Personal Property—List valuable personal property such as artwork, antiques, jewelry and family heirlooms, along with their locations. Include any recent appraisals.
- Financial Assets—List all bank and brokerage accounts and other financial assets, along with account numbers and contact information.
- Debts—List all debts you owe, including mortgages or other bank loans, credit card accounts, and current tax debts. Include account numbers and contact information.

8. Organize Your Tax Records

Keep tax records for at least three years, including all documents for the current year. If you use a tax preparer, note their name and contact details.

9. Review Your Insurance Policies

List the location of your insurance policies, including the bank name and safe deposit box number if applicable, as well as your insurance agents' contact information. Review your coverage yearly to keep it up to date.

What a good feeling to
have everything planned!





Celebrating Life

Your Many Funeral Options

A Funeral is a Celebration of Life

When a loved one is lost, it's important to find healing by gathering together, sharing memories, and celebrating a life well lived. Whether simple or elaborate, your personal funeral wishes are essential, and you have many choices for your service. Your professional funeral director can help you decide and plan.

Planning a funeral in advance is an act of love because it relieves your family of a stressful burden. What are your personal wishes?

- Location
- Visitation
- Open or closed casket
- Photos
- Personal belongings displayed
- Music selections
- Main Speaker
- Sacred text, poetry or other readings
- Family or friends' involvement
- Memorials and charitable donations
- Monument inscription
- Other special wishes

Traditional burial or cremation? It's purely an individual choice.

Both burial and cremation are meaningful and honorable ways to remember a loved one. Each option can include a full funeral service with visitation, a memorial gathering, a graveside tribute, and a lasting monument.

When cremation is chosen, families receive their loved one's remains and may place them in an urn or memorial chest. Some families choose to share the remains among keepsakes or multiple urns. They may then decide on burial or the scattering of ashes in a place of special meaning.

Because some faiths have specific traditions regarding cremation, families planning a religious service should check in advance to ensure their wishes can be honored.

A meaningful celebration of life allows everyone the peace and comfort to heal.

We can help you plan. Call today for your free private conference.

Funeral Preplanning Checklist

☐ 1. Begin the conversation

- ☐ Talk with family about your wishes
- ☐ Ask your loved ones to be a part of the process
- ☐ Talk with friends to find out their experience with preplanning

☐ 2. Choose a funeral home

- ☐ Research local funeral homes
- ☐ Compare costs, services, and reputation
- ☐ Select a provider that aligns with your values and set an appointment

☐ 3. Decide on the type of service and location

- ☐ Traditional funeral
- ☐ Memorial graveside
- ☐ Celebration of life
- ☐ Religious or non-religious elements
- ☐ Location (funeral home or church)

☐ 4. Select final disposition

- ☐ Burial: choose cemetery, plot, & marker
- ☐ Cremation: decide on urn scattering, or placement
- ☐ Cremation after traditional funeral

☐ 5. Plan the details

- ☐ Clergy/officiant or celebrant
- ☐ Readings, music, poems, or prayers
- ☐ Speakers/eulogists
- ☐ Visitation or viewing preferences
- ☐ Clothing/jewelry/glasses

☐ 6. Choose your funeral merchandise

- ☐ Casket
- ☐ Vault
- ☐ Rental Casket
- ☐ Urn
- ☐ Flowers
- ☐ Register Book and Memorial cards

☐ 7. Write down personal information & draft obit

- ☐ Write down personal information
- ☐ Draft obituary
- ☐ Select favorite photos and charities
- ☐ Copy of DD-214 Paperwork
- ☐ Write down life insurance info

☐ 8. Discuss and select financial arrangements

- ☐ Review funeral costs
- ☐ Review payment options
- ☐ Select how you want to pay
- ☐ Receive copies of preplanning paperwork

☐ 9. Share your final wishes with your loved ones

- ☐ Inform your family of your prearrangement
- ☐ Provide copies to family, executor, or attorney
- ☐ Store paperwork in an accessible location

☐ 10. Review & update if needed

- ☐ Revisit your plan every few years.
- ☐ Update if preferences, finances, or family circumstances change

BIOGRAPHICAL INFORMATION FORM

Please complete the following information to help us honor your loved one's life with accuracy and care.

BASIC INFORMATION

Full Legal Name: _____

Preferred Name / Nickname: _____

Date of Birth: _____

Date of Passing: _____

Place of Birth (City, State): _____

Place of Passing: _____

Gender: _____

Marital Status: _____

Social Security Number: _____

FAMILY INFORMATION

Spouse (Current or Predeceased): _____

Children (Names & Locations): _____

Grandchildren / Great-Grandchildren: _____

Parents (Living/Deceased): _____

Siblings: _____

Other Significant Relationships: _____

LIFE & BACKGROUND

Education (Schools, Degrees, Certifications): _____

Occupation / Career: _____

Military Service (Branch, Rank, Years, Honors): _____

Affiliations (Church, Clubs, Organizations): _____

PERSONAL LIFE & LEGACY

Hobbies and Interests: _____

Passions / Causes: _____

Accomplishments or Proud Moments: _____

Special Memories or Stories: _____

SERVICE DETAILS

Burial or Cremation Preference: _____

Type of Service (Traditional, Memorial, Graveside, etc.): _____

Desired Cemetery / Final Resting Place: _____

Clergy / Officiant: _____

Music Selections: _____

Readings / Scriptures / Poems: _____

Pallbearers (if applicable): _____

Special Requests: _____

OBITUARY INFORMATION

Key Life Summary / Notes: _____

Publication Preferences (Newspapers/Websites): _____

FINAL WISHES & INSTRUCTIONS

Clothing / Personal Items: _____

Jewelry Instructions: _____

Charitable Donations (In Lieu of Flowers): _____

Special Messages or Wishes: _____

ADMINISTRATIVE DETAILS

Insurance Policy Information: _____

Pre-Need Contract Information: _____

Veteran Status / DD-214 Provided: ☐ Yes ☐ No

Primary Contact Person: Name: _____

Phone: _____ Email: _____

OPTIONAL PERSONAL DETAILS

Favorite Songs or Music: _____

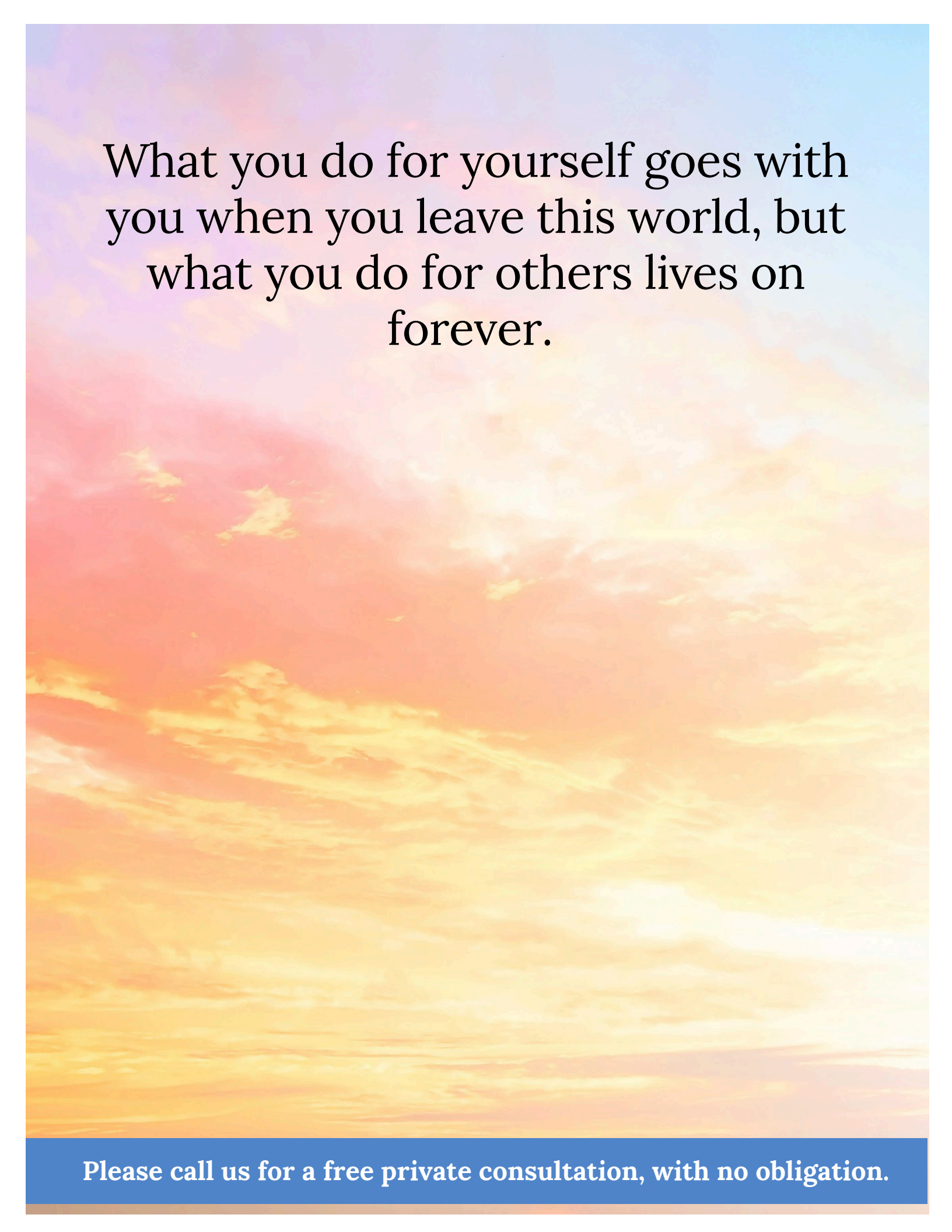
Favorite Food or Meal: _____

Favorite Color: _____

Favorite Saying, Phrase or Scripture: _____

What brought them the most joy? _____

Thank you for allowing us to serve your family. This information helps us create a meaningful and personalized tribute.



What you do for yourself goes with
you when you leave this world, but
what you do for others lives on
forever.

Please call us for a free private consultation, with no obligation.