



Advance Planning

Checklist

Prepare Legal Documents

1. Personal Identification & Essential Documents

- ☐ Birth Certificate
- ☐ Social Security Card
- ☐ Passport

2. Life Events & Legal Status

- ☐ Marriage Certificate – Divorce Papers
- ☐ Veteran's Information: Serial #, Military Service, Honors, Date of Enlistment, Date of Discharge, Benefits

3. Financial & Property Documents

- ☐ Deeds – Titles – Mortgage Papers – Contracts
- ☐ Insurance Policies: Life – Health – Car – Property
- ☐ Bank Accounts – Investments – Credit & Loan Accounts
- ☐ Work Contact Information – Pensions

4. Legal & Estate Planning Documents

- ☐ Last Will & Testament – Trust Documents
- ☐ Advance Care Directive
- ☐ Enduring Power of Attorney
- ☐ Designate an Executor



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5. Digital & Personal Arrangements

- ☐ Login and Passwords for: Computer – Phone – Bills –Emails –Social Media – Subscriptions
- ☐ Contact Information for: Attorneys – Insurance Agents – Accountants – Financial Advisors
- ☐ Decide Who Should Care for Pets

6. End-of-Life Planning

- ☐ Organ Donation Registration (If Applicable)
- ☐ Body Donation Consent Form (If Applicable)
- ☐ Funeral Insurance – Your Funeral Wishes Planned

7. Storage & Communication

- ☐ Fireproof Safety Box for all your Documents
- ☐ Let Family Know Where Important Documents Are Stored



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Funeral Type - Traditional

1. Pre-Arrangements & Major Decisions

- ☐ Choose Funeral Home
- ☐ Choose Cemetery - Private Cemetery - Public Cemetery - Military National or State Cemetery - Natural or Green Cemetery
- ☐ Burial Plot - Crypt - Mausoleum
- ☐ Choose Casket - Urn
- ☐ Embalming - No Embalming
- ☐ Open Casket or Closed Casket
- ☐ Clothing - Hair - Cosmetic
- ☐ Jewelry - These items may remain or be removed; returned after service

2. Ceremony & Service Details

- ☐ Visitation - Viewing - Wake - How Many Days
- ☐ Service - Funeral Home - Church - Place of Worship - Religious Rituals - Military Graveside - Have Service at One Location - Two Locations
- ☐ Clergy - Officiant - Rosary
- ☐ Pall Bearers - Participants for Other Tasks
- ☐ Scriptures - Poems - Readings
- ☐ Hymns - Songs - Vocalist - Pianist or Organist
- ☐ Things You Want Near Casket - Urn - Urn with Photo - Bible - Symbols of Faith - Flag - Favorite Flowers - Live Plant
- ☐ Flowers - Live Plants - Plant a Tree - Donate to a Charity in Lieu
- ☐ Guest Book - Memorial Cards



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Funeral Type - Traditional

3. Burial & Final Resting Arrangements

- ☐ Vault - Opening Gravesite - Closing Gravesite
- ☐ Grave Marker - Standing - Flat - Inscription
- ☐ Memorial Bench (If Desired)
- ☐ Transportation - Hearse - Procession - Limo for Family

4. Post-Ceremony Memorial & Reception

- ☐ Memorial Service - Celebration of Life - Wake at - Home - Place of Worship - Funeral Home - Hall - Restaurant - Garden - Park - Ocean/Beach Side
- ☐ Catering - Potluck - Restaurant Meal for Immediate Family - Barbecue - Park Picnic



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Funeral Type - Cremation

1. Initial Planning & Major Decisions

- ☐ Choose Funeral Home – Crematorium
- ☐ Choose Cemetery – Private Cemetery – Public Cemetery – Military National or State Cemetery – Natural or Green Cemetery (if burial is planned)
- ☐ Burial Plot – Crypt – Niche – Sea Burial – Cemetery Scattering Gardens – Cremation – Columbarium – Remains Stay with Family
- ☐ Choose – Cremation Casket – Indoor Urns – Biodegradable Urns – Scattering Urns – Eco Water Urns
- ☐ Embalming (Not All Places Allow This) – No Embalming

2. Ceremony & Service Details

- ☐ Open Casket – Closed Casket with Photo – Urn with Photo
- ☐ Clothing – Hair – Cosmetic – Jewelry (Returned After Service)
- ☐ Things You Want Near Casket – Urn – Urn with Photo – Bible – Symbols of Faith – Flag – Favorite Flowers – Live Plant
- ☐ Visitation – Viewing – Wake – How Many Days
- ☐ Service – Funeral Home – Church – Place of Worship – Gravesite – Scatter Ceremony – Home – Garden – Park (Choose One Location or Two Locations)
- ☐ Clergy – Officiant
- ☐ Scriptures – Poems – Readings
- ☐ Hymns – Songs – Vocalist – Pianist or Organist
- ☐ Flowers – Live Plants – Plant a Tree – Donate to a Charity in Lieu
- ☐ Guest Book – Memorial Cards – Memory Gifts



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Funeral Type - Cremation

3. Cremation & Final Resting Arrangements

- ☐ Vault - Opening Gravesite - Closing Gravesite (If applicable)
- ☐ Grave Marker - Memorial Stone - Inscription
- ☐ Memorial Bench - Keepsakes & Jewelry

4. Post-Ceremony Memorial & Reception

- ☐ Memorial Service - Celebration of Life - Wake (At Home - Place of Worship - Funeral Home - Hall - Restaurant - Garden - Park - Ocean/Beach Side)
- ☐ Transportation (For Family & Guests, If Needed)
- ☐ Catering - Potluck - Restaurant Meal for Immediate Family - Barbecue - Park Picnic



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Funeral Type - Green Funeral

1. Initial Planning & Major Decisions

- ☐ Choose Funeral Home
- ☐ Choose Cemetery - Private Cemetery - Public Cemetery - Natural/Green Cemetery - Military
- ☐ Burial Plot

2. Preparation & Personalization

- ☐ Choose - Wood/Wicker Biodegradable Casket - Biodegradable Urn - Shroud
- ☐ Embalming - No Embalming
- ☐ Open Casket - Closed Casket with Photo
- ☐ Clothing - Hair - Cosmetic
- ☐ Jewelry - These Items May Remain or Be Removed & Returned After Service
- ☐ Things You Want Near Casket - Urn - Urn with Photo - Bible - Symbols of Faith
Flag - Favorite Flowers - Live Plant

3. Ceremony & Service Arrangements

- ☐ Visitation - Viewing - Wake - How Many Days
- ☐ Service - Funeral Home - Church - Place of Worship - Religious Rituals -
Military - Graveside - Home - Garden - Park
- ☐ Clergy - Officiant - Rosary
- ☐ Pall Bearers - Participants for Other Tasks
- ☐ Scriptures - Poems - Readings
- ☐ Hymns - Songs - Vocalist - Pianist or Organist
- ☐ Flowers - Live Plants - Plant a Tree - Donate to a Charity in Lieu
- ☐ Guest Book - Memorial Cards - Memory Gifts



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Funeral Type - Green Funeral

4. Burial & Final Resting Arrangements

- ☐ Opening Gravesite - Closing Gravesite
- ☐ Grave Marker Stone - Inscription

5. Post-Ceremony Memorial & Reception

- ☐ Memorial Service - Celebration of Life - Wake (Have at - Home - Place of Worship - Funeral Home - Hall - Restaurant - Garden - Park - Ocean/Beach)
- ☐ Transportation - Hearse - Procession - Limousine for Family
- ☐ Catering - Potluck - Restaurant Meal for Immediate Family - Barbecue - Park Picnic