



Funeral Pre-Planning Checklist

Record your wishes, organize important information, and make future decisions easier for the people you love.

Planning ahead is an act of care.

This checklist will help you begin documenting your preferences, organizing important information, and identifying questions you may still need answered. You do not need to make every decision today. Complete the sections that feel comfortable and use this guide as a starting point for conversations with your family and a professional pre-planning counselor.

A complimentary conversation is available, with no obligation.

Ready for personal guidance?

Speak with a Legacy of Love pre-planning counselor to review your questions and next steps.

833-888-0355 | info@legacyoflove.com
www.legacyoflove.com





Funeral Pre-Planning

Checklist

1. Your Goals and Personal Information

Begin with what matters most to you.

Why I am planning ahead

- Make my wishes known
- Reduce difficult decisions for my family
- Understand burial, cremation, and memorial options
- Learn what arrangements may cost
- Review or update an existing plan
- Begin planning for a loved one
- I am not sure where to begin

Personal information

Full legal name	Preferred name
Date of birth	Place of birth
Marital status	Spouse or partner
Phone	Email
Religious or cultural preferences	Veteran or military information

You do not have to plan alone.

A counselor can help you identify which personal details and documents may be needed for a complete plan.

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2. Important Documents and Contacts

Use this page to note what you have and where it is stored.

Important documents

Birth certificate

Power of attorney

Marriage certificate or divorce documents

Life insurance policies

Military discharge records

Property deeds, titles, or mortgage information

Will or trust

Bank, investment, pension, or retirement information

Advance healthcare directive

Existing funeral or cemetery paperwork

Where are these documents stored?

Who knows how to access them?

People and organizations to contact

Family or trusted representative

Clergy or spiritual advisor

Attorney

Veterans organization

Insurance agent

Pet caregiver

Accountant or financial advisor

Other important contact

Employer or retirement administrator

Security note: Do not write passwords in this checklist. Record only contact details and where secure access instructions are stored.

3. Type of Arrangement

Select what you are considering today. It is okay to be undecided.

I am currently considering

- Traditional burial
- Cremation
- Green or natural burial
- Donation to science
- Memorial service without the body present
- I am undecided and would like guidance

Preferred final resting place or disposition

- Cemetery burial
- Mausoleum or crypt
- Cremation niche or columbarium
- Scattering at a meaningful location
- Urn kept by family
- Green or natural burial
- Sea burial
- No preference yet

Preferred cemetery, location, or special instructions

You do not have to plan alone.

Burial, cremation, and green funeral options vary by location. A counselor can explain what is available and what each choice may involve.

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4. Funeral or Memorial Preferences

Document the kind of gathering that feels right to you.

Service preferences

Visitation or viewing	Religious or cultural ceremony
Funeral service	Military honors
Memorial service	Private family gathering
Celebration of life	No formal ceremony
Graveside service	I am undecided

Preferred location

Funeral home	Park, garden, or outdoor setting
Place of worship	Another meaningful location
Cemetery or graveside	No preference yet
Home or private residence	

Location notes - funeral home name, meaningful place, or other preference

Timing and attendance

Open to the public	Daytime service
Family and close friends only	Evening service
Private	No preference yet



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5. Personal Touches

The details below can help your service feel meaningful and personal.

Ideas and preferences

Favorite music or hymns

Photos or video tribute

Poems, scripture, or readings

Flowers, plants, or charitable donations

Preferred officiant or clergy

Obituary information

People I would like to participate

Reception or gathering

Clothing or personal items

Special family, cultural, or religious traditions

How I would like to be remembered

Three things I hope family and friends remember about me:

1.

2.

3.

Additional notes or special instructions

6. Financial Preparation and Next Steps

Use this page to identify the questions you want answered.

Financial preparation

- ☐ I have an existing funeral or cemetery plan
- ☐ I have life insurance that may help cover expenses
- ☐ I have funds set aside
- ☐ I would like to understand estimated costs
- ☐ I would like information about payment options
- ☐ I need help finding arrangements that fit my budget

Questions for a pre-planning counselor

- | | |
|--|--|
| ☐ What options are available in my area? | ☐ What happens if I move? |
| ☐ What does a funeral or cremation typically include? | ☐ Can my plan be changed later? |
| ☐ How much might my preferred arrangements cost? | ☐ Are veterans benefits available? |
| ☐ Can arrangements be funded in advance? | ☐ What should I discuss with my family? |

My additional questions

Your next step

Completing this checklist is an important beginning. A Legacy of Love pre-planning counselor can review your answers, explain your options, discuss estimated costs, and help turn your preferences into a clear plan for your family.

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