

Funeral Planning Checklist



- Gather necessary documents – will, military discharge paperwork (DD 214), life insurance policies, preneed trust/policy, etc.
- Determine method of payment for funeral home, cemetery, or crematory
- If life insurance is available – apply at Beneficiary Advance to receive proceeds within 24 - 48 hours
- Select a funeral home
- Select a cemetery (if burying body or interring cremated remains)
- If cremating, choose final disposition location – cemetery, scattering, home, or other
- Designate the next of kin for making decisions at the funeral home
- Discuss type of services – traditional, memorial, or celebration of life
- Discuss if you would like a viewing prior to the service
- Discuss who will conduct services – clergy, family member, celebrant, or other officiant
- Discuss location of services – funeral home, religious venue, graveside, or other
- Memorialization – cemetery marker, engraved urn, divided cremation remains, cremation jewelry, etc.
- Gather information for obituary – birth date and location, family names and relationships, civic and religious positions held, education and career highlights, military service, hobbies and interests, organization memberships, a farewell message, and photo
- Charitable wishes - if collecting donations to a favorite charity in place of/addition to flowers
- Create a list of friends and family to notify of death
- Collect usernames and passwords to close digital accounts