

Estate Planning



Funeral Plan Worksheet

For _____

Use this worksheet to document your wishes regarding your final arrangements. It will comfort your family if these wishes are made known and are accessible in written form.

1. Do you have a prepaid funeral plan? Yes No
 - a. If yes, please list details:
 - i. Policy Number: _____
 - ii. Contact person: _____
 - b. If no, please detail your preferences for:
 - i. Funeral Director/Who do you want to plan your funeral: _____
 - ii. Budget: _____

2. Do you wish to have a memorial service? Yes No
 - a. If yes, please list your preferences for:
 - i. Place: _____
 - ii. Eulogy given by: _____
 - iii. Speakers: _____
 - iv. Readings: _____
 - v. Music/Hymns: _____
 - vi. Prayers: _____
 - vii. Pallbearers: _____
 - viii. Other Special requests: _____

3. Do you wish to have any of your organs donated? Yes No
 - a. If yes, be sure to indicate on the back of your driver's license.

4. Have you made cemetery arrangements? Yes No
 - a. If yes, please list:
 - i. Plot #: _____
 - ii. Deed #: _____
 - iii. Location: _____
 - iv. Contact Person: _____
 - b. If no, please list where you would like your cemetery arrangements made:
 - i. Location: _____

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5. Please indicate your preferences for Burial Cremation
- a. Details (Large/small gathering, formal/informal gathering, casket type, open or closed casket, burial or scattering of ashes, location, etc.): _____
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6. Tombstone Engraving: _____
- _____
- _____
- _____

7. In lieu of flowers, you may wish to have donations made to a particular charity. If so, please specify the charity: _____

8. Is there a need for a second memorial service, perhaps in a second location?
 Yes No
- a. If yes, Where? _____