

# Pre-Planning Worksheet

- Spiritual Preferences

- My religious preference is \_\_\_\_\_
- I attend services at \_\_\_\_\_
- I would like to observe my religion's mourning events
- How I would like the following religious practices to be followed:

---

---

---

---

- Culture Preferences

- I am from \_\_\_\_\_
- How I would like the following cultural practices to be followed:

---

---

---

---

- End of Life Preference

- Burial
- Cremation
- Body Donation

- Types of Services

- I would like to have a funeral or memorial service
- I would like to have a funeral or memorial service, followed by a graveside service
- I would like to have only a graveside service or a service at the crematory
- I would like to have a funeral or memorial service in my own home
- Where I would like a memorial service \_\_\_\_\_

- Funeral Events

- I would like to have a viewing before my funeral
- I would like to have a wake before my funeral
- I would like to have a visitation before my funeral
- I would like to have a reception or gathering after my funeral or memorial service

- Cremation
  - I would like for my urn to be placed at a cemetery
  - I would like my loved ones to have my ashes
  - I would like my ashes to be scattered at \_\_\_\_\_
  
- Military Funeral
  - I would like to be buried at a VA Cemetery
  - I would like a Veteran's Flag
  
- Funeral Home/Cemetery Information
  - I would like my funeral or memorial service to be held at the following location: \_\_\_\_\_.
  - I would like to use the following funeral home \_\_\_\_\_
  - I would like to use the following cemetery \_\_\_\_\_
  
- Service Preferences
  - The person I would like to officiate my funeral or memorial service is \_\_\_\_\_.
  - I would like an open or closed casket \_\_\_\_\_
  - I would like the following people to serve as pallbearers:
    1. \_\_\_\_\_
    2. \_\_\_\_\_
    3. \_\_\_\_\_
    4. \_\_\_\_\_
    5. \_\_\_\_\_
    6. \_\_\_\_\_
  - I would like the following people to deliver eulogies:
    1. \_\_\_\_\_
    2. \_\_\_\_\_
    3. \_\_\_\_\_
  - I would like the following people to deliver prayers, poems, or other readings:
 

Title/Author/Source	
1.	_____
2.	_____
3.	_____
  - The readings I would like them to deliver are:
    1. \_\_\_\_\_
    2. \_\_\_\_\_
    3. \_\_\_\_\_
  - I would like the following songs, hymns, or pieces of music to be played:
    1. \_\_\_\_\_

- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- I would like people to honor my memory by making a donation to one of the charity organizations that has meant a lot to me:
  - 1. \_\_\_\_\_
  - 2. \_\_\_\_\_
  - 3. \_\_\_\_\_
- I want to be sure that the following people, whom my family may not know, will be notified of and invited to my funeral or memorial service (include lodges, social organizations):
 

Name/Contact Info

  - 1. \_\_\_\_\_
  - 2. \_\_\_\_\_
  - 3. \_\_\_\_\_
  - 4. \_\_\_\_\_
  - 5. \_\_\_\_\_
  - 6. \_\_\_\_\_
  - 7. \_\_\_\_\_
  - 8. \_\_\_\_\_
  - 9. \_\_\_\_\_
  - 10. \_\_\_\_\_

- Finances

- I have prepaid for my funeral arrangements Yes\_\_\_\_ No\_\_\_\_
- I have prepaid for my cemetery plot Yes\_\_\_\_ No\_\_\_\_
- I have Life Insurance Yes\_\_\_\_ No\_\_\_\_
 

Company Name \_\_\_\_\_

Policy Number \_\_\_\_\_
- I have Burial Insurance Yes\_\_\_\_ No\_\_\_\_
 

Company Name \_\_\_\_\_

Policy Number \_\_\_\_\_
- I have a Will Yes\_\_\_\_ No\_\_\_\_
- Veteran (for veteran and spouse)
 

Branch \_\_\_\_\_

I have my DD-214 Yes\_\_\_\_ No\_\_\_\_
- Documents are located \_\_\_\_\_