



Funeral Planning Checklist

Your Planning Preferences

Getting Started

- ☐ Gather basic information for your obituary
 - ☐ Choose a charity or organization for memorial donations (optional)
 - ☐ Select your preferred funeral home
 - ☐ Write down any general wishes or instructions
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Service Preferences

- ☐ Decide between burial or cremation
 - ☐ Select a casket or cremation container (if applicable)
 - ☐ Choose the type of service (traditional, memorial, private, etc.)
 - ☐ Select a location for services
 - ☐ Choose floral arrangements or décor style
 - ☐ Identify photos or personal items to display
 - ☐ Note any religious, cultural, or family traditions
 - ☐ Choose clothing or personal items for final arrangements
 - ☐ Select music, hymns, or readings
 - ☐ Consider a theme or tone for the service
 - ☐ Arrange transportation for family and/or remains
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Participants

- ☐ Choose a clergy member or officiant
 - ☐ Select musicians or vocalists (if desired)
 - ☐ Identify pallbearers
 - ☐ Choose individuals for eulogy, readings, or tributes
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Final Arrangements

- ☐ Select a cemetery or final resting place
- ☐ Choose a burial plot, mausoleum, or niche
- ☐ Select a headstone, marker, or memorial
- ☐ Decide on urn placement or keepsake options (if cremation)
- ☐ Choose who will scatter ashes and where (if applicable)

Information to Have on Hand

Personal Details

- ☐ Father's name
 - ☐ Mother's maiden name
 - ☐ Date and place of birth
 - ☐ Education history
 - ☐ Social Security number
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Family Information

- ☐ Spouse or partner
 - ☐ Children and immediate family
 - ☐ Survivors to be included in an obituary
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Affiliations & Life Story

- ☐ Organizations or memberships
 - ☐ Community involvement
 - ☐ Awards, honors, or recognitions
 - ☐ Hobbies, interests, or passions
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Military Service (If Applicable)

- ☐ Branch and rank
 - ☐ Dates of service
 - ☐ Conflicts served
 - ☐ Service or serial number
 - ☐ Discharge papers (DD214), if available
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Notes & Additional Wishes
