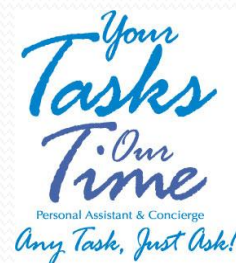


Funeral Guide & Toolkit

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Planning Ahead

Planning your own funeral is not easy, but it is a wise choice. At the time of your death information about your funeral or memorial service will be needed quickly. Planning in advance can spare your family and loved ones in the future. The Planning Guide & Toolkit is the starting point to making things easier for the people you love. It can be rewarding to look back on all you've accomplished. You can celebrate your life as you pull together your keepsakes and reflect on the memorable experiences. Knowing where to find all of your personal documents and important papers will ease the stress for the family during difficult times.

Planning Ahead

The Planning Guide & Toolkit can be used to start a discussion with loved ones about arranging your service and final resting place. Difficult financial details can be worked out in advance to help alleviate additional anxiety and emotional hardship.



Celebrate Your Life Your Way

My Personal History

Full Name:

Date of Birth:

Spouse/Partner:

Children:

Education:

Profession:

Military Service & Citations:

Lodges, Clubs, Associations:

Personal Accomplishments:

Plans I Have Made

Executor or Executrix:

Cemetery:

Address:

Phone:

Plot Location:

Contract Number:

Advance Planning Policy No:

Ceremony Location:

Celebrate Your Life Your Way

Spirituality

Faith/Denomination:

Place of Worship:

Address:

Phone:

Contact:

Favorite Quote or Scripture:

Favorite Songs or Hymns:

My Legacy

My Fondest Memories:

My Proudest Accomplishments:

I Want My Friends to Know:

I Would Like my Epitaph to Say:

My Memorial Ceremony

The emotional impact of losing a loved one can be devastating. The process of planning a funeral can be overwhelming for the family. The family worries that they are not fulfilling your wishes or family members may have conflicting ideas. This is the time to ease that stress and anxiety and to know that your wishes are being fulfilled.

My Memorial Ceremony

I Want to be Remembered For:

Music:

Readings

Clergy:

My Pre-Recorded Message to My Loved Ones is Located:

The Photos I Would Like to Use are Located:

Other Items to be Buried With:

Want My Ashes Scattered At:

Financial & Business Documents

Personal Documents

Document Location:

Birth Certificate

Marriage Certificate

Last Will & Testament

Cemetery Deed

Advance Planning
Policy

Military Discharge
Papers

Income Tax Records

Living Will

Power of Attorney

Safety Deposit Box

Safety Deposit Box
Keys

Other

Financial & Business Documents

Finances

Banking:

Bank Name:

Phone:

Account Number:

- | | | | | |
|-----------------------------------|----------------------------------|---------------------------------------|-----------------------------|--------------------------------|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |

Finances

Banking:

Bank Name:

Phone:

Account Number:

- | | | | | |
|-----------------------------------|----------------------------------|---------------------------------------|-----------------------------|--------------------------------|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |
| <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Money Market | <input type="checkbox"/> CD | <input type="checkbox"/> Other |

Financial & Business Documents

Safety Deposit Box

Bank Name:

Bank Name:

Address:

Address:

Phone:

Phone:

Box Number:

Box Number:

Insurance

Life Insurance Co:

Policy No:

Phone:

Beneficiary:

Record No:

Medical Insurance Co:

Policy No:

Phone:

Home Owners Insurance Co:

Policy No:

Phone:

Property(ies):

Long-Term Care Ins Co:

Policy No:

Financial & Business Documents

Investments – Mutual Funds

Fund Name:

Fund Name:

Address:

Address:

Phone:

Phone:

Account No:

Account No:

Fund Name:

Fund Name:

Address:

Address:

Phone:

Phone:

Account No:

Account No:

Investments – Stocks

Brokerage:

Broker:

Address:

Phone:

Account No:

Stocks Held:

Location of Cert:

Financial & Business Documents

Investments – IRAs

Company:

Address:

Phone:

Account No:

Beneficiary:

Investments – Trusts

Fund Name:

Address:

Phone:

Account No:

Beneficiary:

Investments – Annuities

Fund Name:

Address:

Phone:

Account No:

Beneficiary:

Financial & Business Documents

Property – Primary Residence

Property Address:

Lender:

Address:

Phone:

Loan No:

Property – Secondary Residence

Property Address:

Lender:

Address:

Phone:

Loan No:

Financial & Business Documents

Property – Additional Properties

Property Address:

Lender:

Address:

Phone:

Loan No:

Property Address:

Lender:

Address:

Phone:

Loan No:

Property Address:

Lender:

Address:

Phone:

Loan No:

Financial & Business Documents

Pension - Company

Company:

Address:

Phone:

Account No:

Beneficiary:

Location of Documentation:

Pension - Social Security

SSN:

Beneficiary:

Location of Documentation:

Financial & Business Documents

Personal Loans - Lender

Borrower:

Address:

Phone:

Amount of Loan:

Rate:

Term of Loan:

Location of Documentation:

Borrower:

Address:

Phone:

Amount of Loan:

Rate:

Term of Loan:

Location of Documentation:

Financial & Business Documents

Personal Loans - Borrower

Borrower:

Address:

Phone:

Amount of Loan:

Rate:

Term of Loan:

Location of Documentation:

Borrower:

Address:

Phone:

Amount of Loan:

Rate:

Term of Loan:

Location of Documentation:

Financial & Business Documents

Business Interests

Company Name:

Address:

Phone:

Key Contacts:

Nature of Relationship:

Company Name:

Address:

Phone:

Key Contacts:

Nature of Relationship:

Financial & Business Documents

Professional Resources

List of all the people you want notified of your death.

Attorney:	Phone:
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Accountant:	Phone:
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Doctor:	Phone:
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Doctor:	Phone:
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Executor:	Phone:
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Insurance Agent:	Phone:
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Insurance Agent:	Phone:
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Insurance Agent:	Phone:
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Dept of Motor Vehicles:	Phone:
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Social Security Administration:	Phone:
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Veterans Administration:	Phone:
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Professional Contacts

Employer:	Phone:
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Supervisor:	Phone:
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Other:	Phone:
--------	--------

Financial & Business Documents

Personal Contacts

Family

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

Friends

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

Phone:

What To Do When Your Loved One Passes

Pre-planning gives you the foresight to make informed decisions about your funeral arrangements. It also spares your survivors from having to make difficult and important decisions during emotional times.



✓ Family Check List	
	Notify family & friends
	Contact funeral home
	Call financial institutions & insurance companies
	Determine how many death certificates will be needed
	Write obituary
	Establish who will serve as casket bearers & make request
	Select music, scripture, location & time of service
	Identify people giving eulogies
	Arrange gratuity for officiate or minister
	Make memorial service /reception arrangements

List of Needed Documents

✓ Document Check List

	Death Certificate: 12 – 20 Copies
	Will
	Birth certificate
	Marriage/civil partnership documentation
	Divorce documentation
	Organ donor card
	Insurance, health/life documentation
	Titles/leases to motor vehicles
	Prior tax returns
	Pension/retirement benefit documentation
	Business ownership or interest documentation
	Bank and financial account statements and checkbooks
	Investment statements/share certificates
	Existence of Trust

Funeral Resources

- Social Security Administration:
Toll Free Number (800) 772-1213
- Social Security Benefit Publications
<http://www.ssa.gov.com>
- Department of Veteran's Affairs:
<http://www.ssa.gov>
- Disabilities Benefits:
<http://www.ssa.gov/odhome/odhome.htm>
- Medicare:
<http://www.medicare.gov>
- PA Department of Health
<http://www.dsf.health.state.pa.us/health/site/default.asp>
- Veteran's Administration:
Bucks County Office # (215) 345-3885
Montgomery County Office # (610) 278-3285
Philadelphia # (800) 827-1000
- Survivor Benefits:
<http://www.va.gov/publ/benman95/5SURVIVO.HTM>
- Burial and VA Cemeteries (National Cemetery Information)
<http://www.cem.va.gov>
- Bucks County Veterans - www.buckscounty.org/veterans/
- Military Funeral Honors - www.militaryfuneralhonors.osd.mil/
- Register of Wills -
www.buckscounty.org/departments/registerofwills/index.html

Additional Resources

Veteran's Benefits

The Veteran's Administration provides many benefits for burial services. Since policies often change, it is best to see their website for the most current information here:

www.cem.va.gov/burial.htm

Social Security Administration

A one-time payment of \$255 is payable to the surviving spouse if he or she was living with the beneficiary at the time of death, OR if living apart, was eligible for S.S. benefits on the beneficiary's earnings record for the month of death. If there is no surviving spouse, the payment is made to a child who was eligible for benefits on the beneficiary's earnings record in the month of death.

www.ssa.gov/pubs/deathbenefits.htm

601 E Street, NW

Washington, DC 20049

1-800-424-3410

www.aarp.org

AARP is a nonprofit, nonpartisan organization dedicated to helping older Americans achieve lives of independence, dignity and purpose. Its publications, *Funeral Goods and Services* and *Pre-Paying for Your Funeral*, are available free by writing to the above address. This and other funeral-related information is posted on the AARP website.

Council of Better Business Bureaus, Inc.

4200 Wilson Blvd., Suite 800

Arlington, VA 22203-1838

www.bbb.org

Better Business Bureaus are private, nonprofit organizations that promote ethical business standards and voluntary self-regulation of business practices.

Additional Resources

Funeral Consumers Alliance

33 Patchen Road
South Burlington, VT 05403
800-765-0107 www.funerals.org
FCA, a nonprofit, educational organization that supports increased funeral consumer protection, is affiliated with the Funeral and Memorial Society of America (FAMSA).

Cremation Association of North America

401 North Michigan Avenue
Chicago, IL 60611
(312) 644-6610
www.cremationassociation.org
CANA is an association of crematories, cemeteries and funeral homes that offer cremation.

International Cemetery and Funeral Association

1895 Preston White Drive, Suite 220,
Reston, VA 20191
1-800-645-7700 www.icfa.org
ICFA is a nonprofit association of cemeteries, funeral homes, crematories and monument

retailers that offers informal mediation of consumer complaints through its Cemetery Consumer Service Council. Its website provides information and advice under “Consumer Resources.”

International Order of the Golden Rule

13523 Lakefront Drive
St. Louis, MO 63045
1-800-637-8030 www.ogr.org
OGR is an international association of about 1,300 independent funeral homes.

Jewish Funeral Directors of America Seaport Landing

150 Lynnway, Suite 506
Lynn, MA 01902
(781) 477-9300 www.jfda.org
JFDA is an international association of funeral homes serving the Jewish community.

Additional Resources

National Funeral Directors Association

13625 Bishop's Drive

Brookfield, WI 53005

1-800-228-6332

www.nfda.org/resources

NFDA is the largest educational and professional association of funeral directors.

National Funeral Directors and Morticians Association

3951 Snapfinger Parkway, Suite 570

Decatur, GA 30035

1-800-434-0958 www.nfdma.com

NFDMA is a national association primarily of African-American funeral providers.

Selected Independent Funeral Homes

500 Lake Cook Road, Suite 205

Deerfield, IL 60015

1-800-323-4219

www.selectedfuneralhomes.org

Selected Independent Funeral Homes is an international association of funeral firms that

have agreed to comply with its Code of Good Funeral Practice.

Consumers may request a variety of publications through the association's affiliate, Selected Resources, Inc.

Funeral Service Consumer Assistance Program

PO Box 486

Elm Grove, WI 53122-0486

1-800-662-7666

www.funeralservicefoundation.org

FSCAP is a nonprofit consumer service designed to help people understand funeral service and related topics and to help them resolve funeral service concerns. FSCAP service representatives and an intervener assist consumers in identifying needs, addressing complaints and resolving problems. Free brochures on funeral related topics are available.



Additional Resources

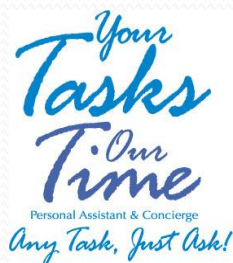
Funeral Service Educational Foundation

13625 Bishop's Drive
Brookfield, WI 53005

1-877-402-5900

www.funeralservicefoundation.org

FSEF is a nonprofit foundation
dedicated to advancing
professionalism in funeral service
and to enhancing public knowledge
and understanding through
education and research.



Solving Problems

If you have a problem concerning funeral matters, it's best to try to resolve it first with the funeral director. If you are dissatisfied, the Funeral Consumer's Alliance may be able to advise you on how best to resolve your issue. You also can contact your state or local consumer protection agencies listed in your telephone book, or the Funeral Service Consumer Assistance Program.

The FTC works for the consumer to prevent fraudulent, deceptive and unfair business practices in the marketplace and to provide information to help consumers spot, stop and avoid them. To file a complaint or to get free information on consumer issues, visit www.ftc.gov or call toll-free, 1-877-FTC-HELP (1-877-382-4357); TTY: 1-866-653-4261. The FTC enters Internet, telemarketing, identity theft and other fraud-related complaints into Consumer Sentinel, a secure, online database available to hundreds of civil and criminal law enforcement agencies in the U.S. and abroad.