

Funeral Planning Checklist

SMITH'S CONSULTING

For the Service :

- Tour funeral homes
- Read funeral home reviews
- Choose location for funeral
- Choose burial or cremation
- Pick casket, container, or mausoleum
- Decide what the deceased will wear
- Decide on what type of service: private-family only, outdoor vs. indoor, visitation or not, open casket or closed, etc.
- Choose who will officiate the service
- Choose pallbearers (usually 6)
- Write or hire someone to write an obituary
- Set up memorial/burial fund (for deceased's family) if needed
- Order floral arrangements for service
- Order Custom Guestbook from Blue Sky Papers
- Order/make any signage for service
- Order/make programs for service
- Plan Transportation
 - o For deceased
 - o For deceased's family
 - o Pallbearers
 - o Police escorts
- Plan post funeral reception
 - o Location
 - o Food + drinks
 - o Tableware + silverware
 - o Tables + chairs
 - o Décor

People to Contact/Notify :

- Family + friends
- Place of employment
- Social security office (if received)
- Deceased's attorney
- Deceased's accountant and/or executor of estate
- Deceased's Life insurance Company + file a claim
- Deceased's credit card companies + pay off remaining balances
- Discontinue all of the deceased's utilities
- Stop all subscriptions of the deceased's. (Magazine's, newspapers, Netflix, etc.)
- Contact post office and forward all remaining mail

Collect Personal Info. :

- Info to get death certificate
 - o Deceased employment info.
 - o Social security number
 - o Parents full name
 - o D.O.B.
- Financial Documents:
 - o (Money) Stock Certificates
 - o Bonds + CDS
 - o Title Documents
 - o Bearer Bonds
 - o Bank Statements
 - o Brokerage Statements
 - o Deeds
 - o Prenuptial Agreement

Notes :