

UNDERSTANDING YOUR PREFERENCES

Personal Wishes

It's important to identify and document your personal wishes. Consider what elements are most meaningful to you, such as specific music, readings or rituals. Think about the setting and atmosphere you want to create, whether it be formal or casual, indoors or outdoors.

Setting: Specify the location and setting for your services. _____

People: Who would you like to be involved in the service? _____

Music: List your favorite songs or types of music you'd like to be included. _____

Readings: Note any specific poems, scriptures or passages you'd like read. _____

Rituals: Describe any cultural or personal rituals you'd like incorporated. _____

Final Care

Consider your preferences for the final preparation and care for your body.

Preparation & Care: Embalming ☐ Other Preparation for Non-Embalmed Viewing ☐

Burial ☐ Cremation ☐ Other _____

Memorial Vessel for Remains: Casket ☐ Urn ☐ Other _____

Final Resting Place (or places)

Cemetery ☐ Mausoleum ☐

Cemetery Name _____

Address _____

Address _____

Plot, Niche, or Crypt # _____

Monument ☐ Marker ☐ Is it installed? Yes ☐ No ☐

Name of Monument/Marker Supplier _____

Location _____ Phone # _____

How to Use this Guide

This guide is designed to help you preplan your final service arrangements, ensuring your wishes are honored and your family is supported during a difficult time. By taking these steps now, you can provide peace of mind for yourself and your loved ones.



REMEMBER

Add your name or your loved one's name above

A Short Workbook for Preplanning
Ensuring your wishes are honored and your family is supported.

A LIFE STORY

General Information

Name	Gender	Date of Birth
Address	Residence Phone #	
Race	Place of Birth	
Citizenship	Marital Status	
Place of Marriage	Date	
Name of Surviving Spouse	Spouse's Maiden Name	
Usual Occupation	Type of Business/Industry	
Employer		
Education: Elementary/Secondary		
Post-Secondary		
Degree(s)		
Father's Full Name		
Father's Place of Birth		
Mother's Full Maiden Name		
Mother's Place of Birth		

Community Involvement

Church Membership
Other Clubs/Organizations
Any Other Significant Community/Public Service

Armed Forces

Date Entered Service	Place	
Significant assignments (units, locations, ranks held)		
Date Left Service	Place	
Last Rank Held	Total Years Served	Service Serial #
Location of Military Discharge Papers (DD214)		
Military Decorations, Honors, Citations and Awards Earned		
Wars/Conflicts Served		

Location of Vital Documents

Original Birth Certificate
Marriage Certificate
Life Insurance Policy
Social Security Card
Property Deeds And Title(s)
Automobile Title(s)

Will Details

I have a Will:	Yes	No
Date of Will	Location of Will	
Executor Name		
Address	Phone #	
Prepared by (Attorney)		
Address		
Address	Phone #	
I have a Living Will:	Yes	No
Location of Living Will		

Social Security Information

Social Security Number	
Address of nearest Social Security Office	
Phone Number	
To facilitate receiving Social Security benefits, you will need the following information when you contact the office:	
☐	Social Security Number
☐	Marriage license
☐	W-2 for the previous two years
☐	Proof of widow(er)'s age if 62 years or older
☐	Certified copy of death certificate

For more information, call the SSA toll-free number **800.772.1213** or visit www.ssa.gov.