



REMEMBER

Add your name or your loved one's name above

A Comprehensive Guide & Workbook for Preplanning
Ensuring your wishes are honored and your family is supported.



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.

How to Use This Guide

This guide is divided into sections that cover all aspects of preplanning. Each section provides detailed information and prompts to help you make informed decisions.

Importance of Preplanning

Preplanning your funeral is such a thoughtful and proactive step. It allows **you** to make decisions calmly and rationally, without the emotional stress that accompanies a loss. Involving your family in the process ensures that everyone understands and respects your wishes, fostering a sense of unity and support.

Table of Contents

Introduction.....3

1. The Importance of Gathering - Remembering Together4

2. The Benefits of Preplanning and Prefunding6

3. Defining Key Concepts: Service, Ceremony, Celebration & Grief.....8

4. Focusing on Your Family’s Needs10

5. Understanding Your Preferences.....15

6. Completing Your Plan20

Vital Statistical Information & Notes22

1. THE IMPORTANCE OF GATHERING

Remembering Together



Community Support

Gatherings play a crucial role in providing communal support, comfort and connection during times of loss. They offer an opportunity for friends and family to come together, share their grief and support one another. The communal aspect of funerals helps to validate the loss and provides a network of emotional support.



Loss Validation & Support

Coming together after a loss helps family and friends find support in their grief. The shared experience of mourning allows individuals to express their emotions and find comfort in knowing they are not alone. This collective support is essential for emotional healing and coping with the loss.

Memory Sharing

One of the most valuable aspects of a gathering is the opportunity to share stories and memories. These moments of remembrance celebrate the life of the deceased and help to keep their memory alive. Sharing personal anecdotes and cherished memories creates a lasting tribute and strengthens the bonds among those left behind.

A Life Story

Special Achievements & Favorites

LIST BELOW

Hobbies

Favorite places

Favorite color Favorite flower Favorite season

Favorite song

Favorite Scripture

Favorite saying

Community Involvement

NOTE ANY OFFICES HELD



Church Membership

Civic Groups/Clubs

Other Clubs/Organizations

Professional Organizations

Fraternal 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)

Many veterans have served in more than one branch.
If you have, indicate approximately how many years in each:

Branch of Service Number of Years

Branch of Service Number of Years

Branch of Service Number of Years

Other U.S. or Foreign Branch

Military Decorations, Honors, Citations and Awards Earned

Wars/Conflicts Served



As a Veteran, you may be entitled to special benefits and allowances. For more information, call the Veterans Administration at 800.827.1000 or visit www.va.gov.

2. THE BENEFITS OF PREPLANNING AND PREFUNDING



Peace of Mind

Preplanning your funeral arrangements provides peace of mind, knowing that your wishes are documented and will be honored. This reassurance is a gift to both you and your family, as it removes the uncertainty and stress of making decisions under pressure. With a clear plan in place, you can rest easy knowing your final wishes will be respected.

Stress Alleviation

Preplanning alleviates the burden of decision-making for your family members during an already challenging time. When a loved one passes away, the emotional toll can be overwhelming. Having a prearranged plan in place allows your family to focus on their grief and healing, rather than logistical details.

Financial Benefits

Prefunding your funeral arrangements can offer significant financial benefits. By locking in current prices, you protect yourself and your family from future inflation and rising costs. Additionally, prefunding can ease the financial strain on your loved ones, as the expenses are taken care of in advance.

Informed Decisions

Preplanning allows you to make informed and thoughtful decisions without the pressure of immediate need. You can take the time to explore your options, discuss them with your family and choose what best reflects your wishes and values. This deliberate approach ensures that your final arrangements are exactly as you envision them.



3. Defining Key Concepts: SERVICE, CEREMONY, CELEBRATION & GRIEF



Service

A service refers to the different types of gatherings that can take place in honor of the deceased. These can be religious or secular, depending on personal beliefs and preferences. Services often include eulogies, prayers, an open mic forum and other commemorative activities that reflect the life and values of the deceased.



Ceremony

A ceremony is a structured event that honors and remembers a loved one. It can include various elements such as readings, music and rituals. The purpose of a ceremony is to provide a formal setting for mourning and reflection, offering a path through grief and respect for the departed.



Celebration

Celebrating a life involves remembering the positive and joyful moments shared with the deceased. This can include sharing stories, as well as displaying photos and an array of memorabilia and mementos that highlight achievements, adventures and hobbies. Celebrations provide an opportunity to honor the incredibly unique personality and legacy of the individual.



Grief

Grief is the natural emotional response to loss. It encompasses a range of feelings such as sadness, anger and confusion. Understanding the grieving process is crucial, as it helps individuals cope with their emotions and find ways to heal. Service, with ceremony and/or celebration, play a significant role in facilitating this healing process.



4. FOCUSING ON YOUR FAMILY'S NEEDS

It's essential to consider the needs and wishes of your family when planning your funeral. After all, this day is to help them as much as it is to honor you.

Think about how your choices can provide comfort and support to your loved ones. Discussing these considerations in advance can help ensure that everyone feels included and thought about in the process.

Special Considerations

Children: Make special arrangements for younger family members, such as child-friendly activities.

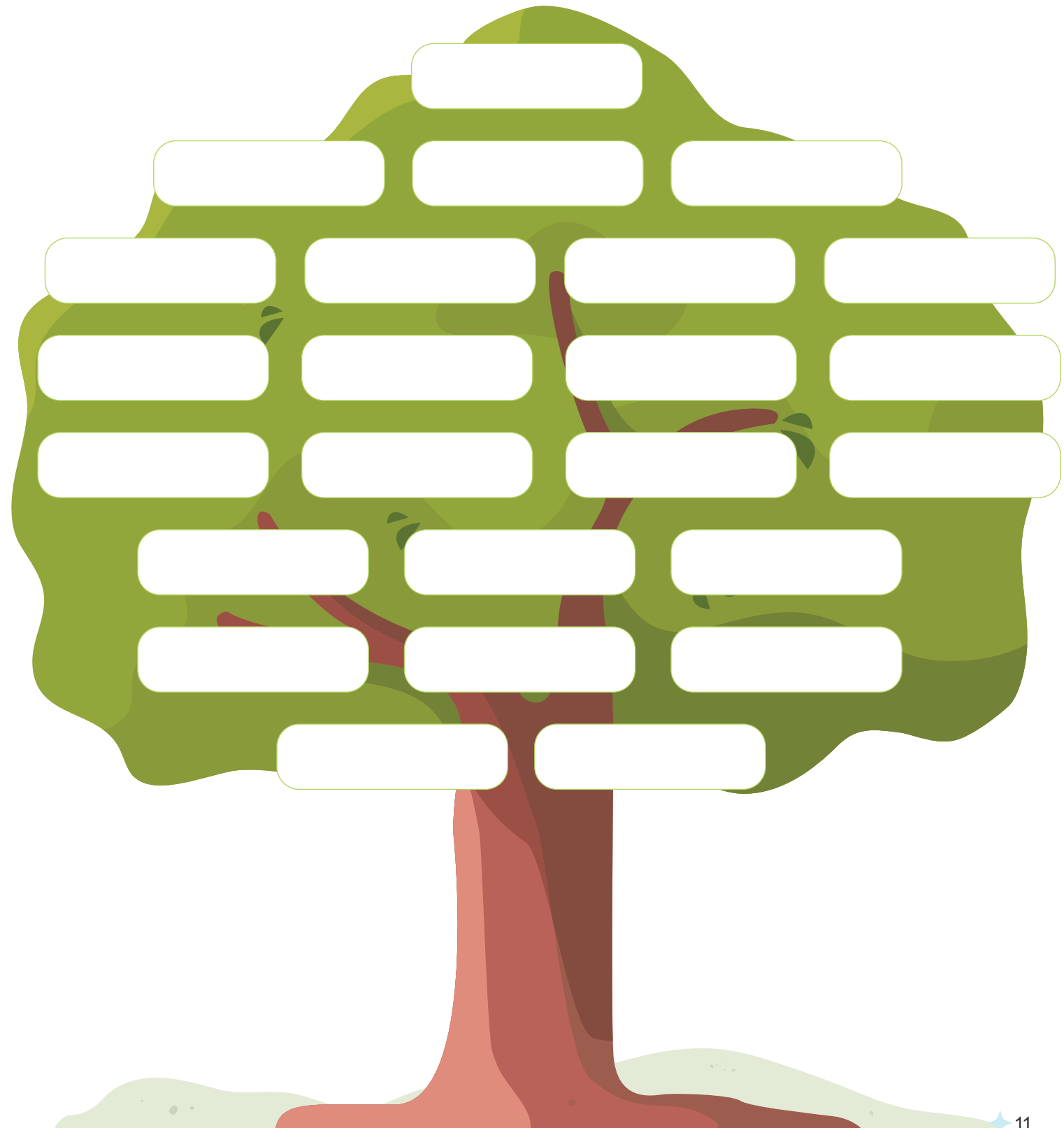
Elderly Family Members: Ensure that the venue is accessible and comfortable for elderly attendees, with appropriate seating and assistance as needed.

Family Involvement

Involving your family in the planning process can foster a sense of unity and shared purpose. Encourage open communication and allow them to express their thoughts and preferences. This collaborative approach can help create a service that honors your wishes and supports your family.

OUR FAMILY TREE

Include Family and Cherished Friends





FOCUSING ON YOUR FAMILY'S NEEDS

CONTINUED

Assembling Life's Paperwork

In the days immediately following a death, one of the more distracting aspects can be producing all of the right documents. Some are either required by law or by the rules of insurance companies, cemeteries or other agencies. When you're thinking calmly, it's easy to understand why all the paperwork is necessary, but, for those who are grieving, the last thing they need is to have to search for various information and documents.

Location of Vital Documents

Original Birth Certificate _____

Marriage Certificate _____

Life Insurance Policy _____

Social Security Card _____

Property Deeds And Title(s) _____

Automobile Title(s) _____

Importance of a Will

If you die without a will, state law and the courts determine who will administer your estate, handle financial matters and act as guardian for your minor children. With a will, you choose. Review your will every few years, particularly if you have moved or your family situation has changed since you last executed a will. State laws vary as to formal requirements and as to the rights of children and grandchildren born after a will was executed.

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 _____

Helping Your Family Through Grief

There are ways you can help your family cope with their emotions and begin a journey of healing with incredible memories you share with them.

Messages of Comfort: Write a message to loved ones that they can read after your passing.

Symbols of Love: Identify an object, place or symbol that reminds you of them. Write about why this symbol is significant and how it can serve as a source of comfort and connection in their journey of grief.

Personal Growth: Consider how a loved one influenced your life. In what ways did they help shape you? Reflect on how you can show gratitude for how they influenced you.



FOCUSING ON YOUR FAMILY'S NEEDS

CONTINUED

Sharing Moments: Share favorite moments you have about specific loved ones. Vacations, experiences, milestones, car rides, firsts, hard and fun times together.

Reflecting on Your Legacy: How can your loved ones continue your legacy in their own lives? What actions or traditions would you like them to carry on in your memory? Remember these can be serious and funny. It is your legacy.

What are some values and lessons that you hope to leave behind for your loved ones?



5. UNDERSTANDING YOUR PREFERENCES

Personalization
 Personalizing your funeral plan can make the service more meaningful and reflective of your life. Consider incorporating your hobbies, interests, work and military service into the ceremony. Personal touches can include displaying your artwork, playing your favorite sports team's anthem or highlighting your career achievements.



5.

UNDERSTANDING YOUR PREFERENCES

CONTINUED

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.



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.



Setting: Specify the location and setting for your services.



Food and Drink: Indicate any preferences for food and beverages to be served.



Flowers & Memorial Donations: Are there any specific memorial gift requests, including flowers or organizations you would like?



Attire: Note any specific attire you would like to be placed in or that you would like for people to wear.

NOTES



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 # _____

NOTES

6. COMPLETING YOUR PLAN

Prefunding Benefits

Prefunding your funeral offers significant advantages. By paying in advance, you lock in current prices and avoid future inflation. This financial foresight can ease the burden on your family and provide peace of mind.

Considerations

When planning your finances, consider the following:

Today's Cost: Understand the current cost of funeral services and exactly what is included.

By preplanning and prefunding, you can actually put money back in your pocket.

When you lock in today's prices, you avoid the future increases in funeral costs due to inflation and rising expenses.

In this way, preplanning isn't just about peace of mind—it's also a smart financial move that keeps more money where it belongs: in your pocket.



Three simple steps today can help prevent the difficult decisions your family will face.



STEP 1
Gather and organize documents and other important information.

STEP 2
Preplan your funeral and/or cremation arrangements.



STEP 3
Begin creating your legacy by writing down your memories.

Payment Options: Compare different payment options and choose the one that best suits your needs.

* <https://nfda.org/news/media-center/nfda-news-releases/id/8134/2023-nfda-general-price-list-study-shows-inflation-increasing-faster-than-the-cost-of-a-funeral> (2023.)
** NFDA Consumer Awareness & Preferences Study (2024.)

VITAL STATISTICAL INFORMATION & NOTES

General Information Needed to Obtain a Death Certificate

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 _____

Primary Contact Upon Death

[illegible]

Address _____

Secondary Contact Upon Death

Name _____ Phone # _____

Address _____

Physician

[illegible]

Address _____

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.

NOTES



www.nglic.com

Product underwritten by National Guardian Life Insurance Company in Madison, Wis. National Guardian Life Insurance Company is not affiliated with The Guardian Life Insurance Company of America a.k.a. The Guardian or Guardian Life. TX Residents: The Texas Department of Banking provides consumers with additional information on the purchase of prepaid funeral benefits at www.prepaidfunerals.texas.gov.

5068 09/24