



Celebrate a Beautiful Life®

Funeral Planning Checklist

Additional information and resources are available online at

<https://decorative-urns.com/cremation-blog/estate-planning/the-ultimate-funeral-planning-checklist/>

[] Get an Executor.

The executor of your estate will be responsible for your financial details, for funeral and burial arrangements, and will pay for associated costs out of the estate.

Note on government accounts:

The executor should call any source of government benefits (such as SSA or VA) and be certain to close accounts. A particular problem can be Social Security benefits received through direct deposits. The SSA should be notified immediately to avoid financial and legal hassles. The Social Security website provides an outline on how to report a death.

[] Make Contact Lists.

- Friends and family who will wish to be contacted in preparation for the funeral. Include names, addresses, phone numbers, email, social media, and a note about their relation to you.
- Account information for the executor: this could include: bank accounts, insurance policies, retirement plans, investments, properties, law firms, and safe-deposit boxes.

[] Managing Online Accounts.

Assign someone to manage any online accounts such as email and social media. Steps can be taken to cleanly preserve or close your accounts so they are not left in a state of uncertainty. You can add this list as a letter of instruction to your last will and testament.

[] Consider Arrangements for the Family Pets.

You can dedicate a provision in your will for this. You can also set up a formal pet trust.

[] Talk to a Funeral Director and Plan the Actual Service.

One of the biggest impacts you can make on the stress of your loved ones after your passing is to speak with a funeral director and make plans and payments, or plans for payment.

[] Death Certificate.

The funeral home can assist with obtaining the death certificate, and the executor will need multiple copies. It is recommended to order twice as many certificates as you think you'll need for filing the final tax return. It is recommended to order twice as many certificates as you think you'll need, just to be certain that you have enough.

[] Prepare the Obituary.

- Common items included in an obituary are Vital statistics, memberships and associations, hobbies, etc. A full walk-through along with downloadable templates are available on our website.
- Decide on which newspapers or other publications will be used to place the obituary notice

[] Decide if there will be a wake or other memorial gathering.

Take some time to think about a memorial service that would be pleasing and respectful. Consider your guests and their transportation, as well as the roles they might play in the ceremony.

Remember to think in terms of a celebration of the accomplishments and a life lived well, of the stories of family and friends, and of the things that bring you all together.