

Advance Planning Worksheet

There are numerous benefits to pre-planning a funeral, including:

- *Providing peace of mind*
- *Relieving your loved ones of unnecessary concern*
- *Reflecting your expressed wishes*

Information about person completing this form:

First Name: _____

Last Name: _____

Middle Name: _____

Email: _____

Street Address: _____

City: _____

County: _____

State: _____

Zip Code: _____

Phone: _____

Person for whom I am pre-planning is: _____ (i.e. myself, spouse, parent, etc.)

Information about person for whom pre-planning is being done:

(If you are filling this form out for yourself, information above does not need to be duplicated.)

First Name: _____

Last Name: _____

Middle Name: _____

Sex: Male ___ Female ___

Social Security #: _____

Marital Status: _____

Date of Birth: _____

Place of Birth: _____

Spouse's Name: _____

Spouse's Maiden Name: _____

Father's Name: _____

Mother's Maiden Name: _____

Public Viewing: Yes ___ No ___

Disposition Options: Earth Burial ___ Cremation ___

Cemetery: _____

Work and Education:

Highest Education Achieved: _____

Usual Occupation: _____

Kind of Business: _____

Company: _____

Military Records:

Branch of Service: _____

Serial Number: _____

Date Enlisted: _____

Rank: _____

Date Discharged: _____

Copy of Discharge Papers Available: Yes ___ No ___

Funeral Service Information:

Place of Service: _____

Address: _____

Officiant: _____

Place of Visitation: _____

Person(s) to finalize arrangements at time of death:

Check here and skip this section if the person filling out this form is also the person making the final arrangements.

Name: _____

Street Address: _____

City: _____

County: _____

State: _____

Zip Code: _____

Phone: _____

Special Instructions:

(You may use the space on this sheet or add pages as needed.)