

Prearrangement Checklist

Vital Statistics (including)

- ☐ Full Legal Name
- ☐ Name of Father, place of birth, year
- ☐ Mother's Maiden Name, place of birth, year
- ☐ Date and Place of Birth
- ☐ Education – elementary, high school, college, graduate school
- ☐ Social Security Number

Persons to Contact

- ☐ Children, Relatives and Friends to Notify
- ☐ Executor of Estate
- ☐ Attorney
- ☐ Accountant
- ☐ Financial Advisor

Veteran Information

- ☐ Military Service
- ☐ Branch
- ☐ Rank
- ☐ Date of Enlistment
- ☐ Date of Discharge
- ☐ Name(s) of war/conflict(s) toured
- ☐ Serial Number
- ☐ Military Awards or Medals

Affiliations

- ☐ Fraternal, Service and Union Memberships
- ☐ Special Recognitions
- ☐ Professional Associations
- ☐ Membership Cards or ID Numbers

Funeral Preferences

- ☐ Preferred Clergy/Celebrant
- ☐ Names of Pallbearers and Honorary Pallbearers
- ☐ Preferred Music, Bible Verses or Poetry
- ☐ Preferred Clothing or Jewelry
- ☐ Burial Property Information
- ☐ Special Instructions
- ☐ Organ Donation Instructions
- ☐ Eulogy Preferences
- ☐ Funeral Service Venue

Location of Important Documents and Passwords

- ☐ Will and Testament
- ☐ Insurance Policies
- ☐ Deeds and Titles
- ☐ Banking Information
- ☐ Digital Accounts and Passwords
- ☐ Safe Deposit Box Key