

YOUR FAREWELL PLANNING CHECKLIST

Be sure to incorporate any funeral wishes your loved one may have had as you begin your planning

PLANNING YOU NEED TO CONSIDER:

- Decide what type of service you would like
- Choose a location for the service(s)
 - Funeral Home
 - Place of Worship
 - Cemetery
 - Other
- Choose between a burial or cremation
- Will the services be private-family only or open?
- Will there be a viewing prior to the service?
 - Will the casket be open or closed?
- Select who you would like to fill various roles
 - Officiant
 - Pallbearers
 - Readers
 - Eulogies
- Select readings and music for the service
- Choose other personal touches
 - Flowers
 - Program
 - Photos for the program and/or to have displayed during the service
 - Poems / Quotes
 - Physical/ Virtual guestbook
- Confirm transportation for close family
 - Determine if police escort is necessary
- Select a charity or organization that your loved one supported for family and friends to make donations to in their honor
- Draft an obituary

Your Farewell Partner is here to support you with managing these details and more, so that you can remain present with your loved ones.

FAREWELL PARTNERS

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NOTIFICATIONS YOU NEED TO MAKE:

please note, some of these may not apply

- Family & Friends
- Place of employment
- Social Security office
- Attorney
- Accountant or Executor of Estate
- Life Insurance Company
 - File a claim
- Credit card companies
 - Pay off remaining balances and cancel cards
- Discontinue utilities and cancel subscriptions
- Contact US Postal Service and forward any remaining mail

DOCUMENTS YOU NEED TO GATHER:

- Collect the following for the Death Certificate
 - Employment information
 - Social security number
 - Parents full names
 - Date of birth
- Financial documents

While these documents are not required for the funeral arrangements, this is a helpful list of financial information that you will need to gather at the appropriate times.

- Stock certificates
- Bonds
- Title documents
- Bearer bonds
- Bank statements
- Brokerage statements
- Deeds

We know that these are emotional and challenging times, your Farewell Partner is here to guide and help you with every detail along the way.