

PRE-PLAN YOUR FUNERAL:

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*Six Easy Steps to Create  
Peace of Mind*

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Courtesy of

R.W. *Owens*  
AND SON  
FUNERAL HOME

[owensandsonfh.com](http://owensandsonfh.com)

# PRE-PLAN YOUR FUNERAL:

## *Six Easy Steps*

*One of the greatest gifts you can give your loved ones is making your funeral plans in advance. Overall, advanced planning saves time and money, gives you the flexibility of knowing your funeral options, and helps put your affairs in order in case of an untimely death or illness.*

*Just as important, advanced planning relieves your family from having to make difficult decisions at their time of loss. It may help ease their financial burden, eliminate family miscommunication, and provide comfort to those who want to honor your life in a way that is meaningful.*

*We have created this planning guide to help you as you make these important decisions. With over 70 years of experience, our funeral home has a reputation for unparalleled care and service. This guide is simply one way we can offer our expertise to you.*

## **STEP 1: Organize Your Personal Information**

The best way to begin your planning process is by listing vital information about your personal affairs. We have created a convenient forms section to guide you through this step; you'll find the forms starting on page 5. You will provide this information to the funeral home.

## **STEP 2: Share Your Wishes for Your Service**

What would you like your final arrangements to include? What are your wishes for the type of service or celebration of life you want to have? The form to describe your wishes begins on page 7. If you are not yet sure and want to learn more about your funeral service options, contact your preferred funeral provider for more information.

## **STEP 3: Share Your Wishes for Your Burial**

What wishes do you have for your burial? What cemetery would you like to use? This information may be listed on page 10.

## **STEP 4: Make Financial Arrangements and Tour the Facilities**

Once you have an idea of the type of service and remembrance you would like to have, it's time to make "pre-need" arrangements and schedule an appointment with your chosen funeral home. As you make arrangements, please keep in mind that by pre-paying for your arrangements, you may relieve a future financial burden for your family. Most states regulate the requirements for pre-need funeral contracts and your funeral director will be your best resource for guidance. See page 11.

If you are undecided on which funeral home or cemetery to use, we recommend you schedule a visit and tour the facilities of the locations you are considering. Like any business, the services each offers and the quality of care you receive will vary. With a visit, you can ensure you have selected a provider that meets your expectations.

## **STEP 5: Gather Other Important Information**

Use this section to list location of your will, bank accounts, location of safe deposit box, insurance policies, and other information. This ensures your family will have all your information in one place. See page 13.

## STEP 6: Share Your Plans

Now that you know what you want and have made arrangements for payment, share your plans with your family and loved ones. A copy of your directive will be kept with the funeral home, and should also be shared with your executor and anyone else who will be involved in planning your services. See page 15.

## STEP 1: My Vital Statistics

### Please provide us with your vital statistics

Legal name (including maiden name): \_\_\_\_\_  
Current address: \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Date of birth: \_\_\_\_\_ Place of birth: \_\_\_\_\_  
Mother's name (including maiden): \_\_\_\_\_  
Father's name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_ Sex:  Male  Female  
Race: \_\_\_\_\_  
Marital status:  Married  Widowed  Divorced  Never married  Separated  
Spouse's full name: \_\_\_\_\_  
Spouse's phone number, if different: \_\_\_\_\_  
Date and place of marriage: \_\_\_\_\_

### What would you like us to know about you?

Occupation: What type of work did you do most of your working life?  
(Please don't list "retired"): \_\_\_\_\_  
Religion or church affiliation: \_\_\_\_\_  
Clubs, organizations and other information: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Education: What is the highest degree or level of education you have completed?  
\_\_\_\_\_  
What school (s) did you attend? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Are you a veteran?  Yes  No  
If yes, please provide details: \_\_\_\_\_  
Branch of service: \_\_\_\_\_ Serial number: \_\_\_\_\_  
Rank: \_\_\_\_\_ Theater(s) of service: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Relatives (besides spouse, if listed above)

Name

Relationship

City, State

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## Step 2: My Wishes for My Service

Please provide what you would like your service to include.

### Funeral or memorial service decisions

#### Funeral home:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Funeral director, if known: \_\_\_\_\_

What type(s) of service or celebration of life do you want to have?

Traditional funeral  Memorial service  Mass  Graveside

Do you want:  Traditional burial / entombment OR  Cremation

Location of service:

Funeral home chapel  Church  Temple  Gravesite  Other event venue (please specify):

\_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Do you want to have a visitation\*?  Yes  No

Visitation at the funeral home  Remembrance gathering at the funeral home

Rosary service  Other (please specify): \_\_\_\_\_

\*A visitation or remembrance gathering is normally held at the funeral home the day of or the evening before the funeral service. This is a time for family and friends to visit and share memories of the life lived, and to offer support to one another. It is also a time when friends who will be unable to attend the service can visit with the family. The visitation may or may not include a viewing of the deceased, depending on personal choices and the type of service selected.

### Reception information

Do you want to have a reception?  Yes  No \_\_\_\_\_

Location:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Special requests: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Service Requests

### Officiating clergy:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Other participants:

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Music:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Scripture and readings:** *List name and reader (if applicable)*

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Military honors:**  Yes  No

Honor guard  Yes  No \_\_\_\_\_

Flag  Yes  No *Note: if yes, the funeral home will complete a form to request a United States flag for burial purposes*

Display:  Display flag in flag case  Drape flag on casket  Other (please specify)

\_\_\_\_\_

Will flag be presented  Yes  No If yes, to whom: \_\_\_\_\_

\_\_\_\_\_

If yes, where:  Service  Gravesite  Other (please specify) \_\_\_\_\_



Pallbearers: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other service requests: \_\_\_\_\_  
\_\_\_\_\_

**Memorial Donations**

Do you want memorial donations?  Yes  No

If yes, please list the names and addresses of the organizations you have selected:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Obituary:**

Name and city/state of newspaper(s):

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Other media (please specify): \_\_\_\_\_  
\_\_\_\_\_

Please list special items to include that are not already listed above:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### Step 3: My Wishes for Burial

#### Final burial place

Ground burial    Mausoleum crypt    Niche

Other (please specify): \_\_\_\_\_

#### Cemetery or place of disposition:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Contact: \_\_\_\_\_

Plot or location number: \_\_\_\_\_

Location of deed: \_\_\_\_\_

## STEP 4: Make Financial Arrangements and Tour the Facilities

You may choose to pay for your final arrangements and cemetery property in advance. In addition to “freezing” current prices and guarding against inflation, the pre-payment may relieve your family of a financial burden in the future and ensure your wishes can be fulfilled.

The best resource to discuss pre-payment options is with your funeral director. These financial arrangements are strictly regulated by various state agencies, and your funeral director must know the laws applicable in your state. Most states allow for pre-need contracts to be made irrevocable for Medicaid eligibility; visit with your funeral director for details.

### Sample plan options

**Insurance funded pre-need plans:** For those who are of insurable health and in certain age ranges, various insurance pre-funded plans are available in a wide range of payment options. Insurance premiums are determined by age, and generally the younger you are when you purchase your plan, the lower the premium you may receive. Premiums may typically be paid on a monthly, quarterly, semi-annual or annual basis. There are no yearly 1099 tax statements issued for an insurance funded plan if the contract is kept until maturity.

**Trust funded pre-need plans:** A trust funded pre-need plan is used when you want to freeze the cost of a funeral and guard against inflation but you are not of insurable health. Payment options are available; see your funeral director for details.

### Pre-need cemetery property

Pre-need purchase of cemetery property and a memorial, a mausoleum crypt or a columbarium niche are also available from the cemetery you have selected. Contact your cemetery of choice for details and pricing options.

## Touring

- Schedule a funeral home tour so you can see the facilities you may want to use: visitation room, chapel, cremation viewing room, etc.
- Spend time examining the caskets, urns, burial vaults and other merchandise that may be selected as part of your final arrangements
- Ask as many questions as you can think of. Your funeral director is there to help, and no question is too small or insignificant.
- Get information about the funeral home: what services they offer, who your family will work with, how calls are handled after hours, etc.
- Get pricing and pricing options so you can discuss your plans with family who will assist with your planning
- Repeat this process with your chosen cemetery, exploring options such as family estates, mausoleums, columbariums, perpetual care, and other benefits you may choose

## STEP 5: Gather Other Important Information

### Important documents

Location of will: \_\_\_\_\_ Date of current version: \_\_\_\_\_

Safe deposit box:  Yes  No Bank name and branch location: \_\_\_\_\_

Location of key: \_\_\_\_\_ Box number: \_\_\_\_\_

Location of these items:

Birth certificate: \_\_\_\_\_

Driver's license / number: \_\_\_\_\_

Social security card / number: \_\_\_\_\_

Naturalization documents: \_\_\_\_\_

Passport: \_\_\_\_\_

Child custody papers: \_\_\_\_\_

All household insurance policies (health, homeowners, renters, auto, etc.): \_\_\_\_\_

Property records and deeds: \_\_\_\_\_

Trust documents: \_\_\_\_\_

Power-of-attorney: \_\_\_\_\_

Medical power-of-attorney: \_\_\_\_\_

Advanced health care directives: \_\_\_\_\_

Computer passwords: \_\_\_\_\_

Life insurance policies:

Insurance company: \_\_\_\_\_ Amount: \_\_\_\_\_

Insurance company: \_\_\_\_\_ Amount: \_\_\_\_\_

Insurance company: \_\_\_\_\_ Amount: \_\_\_\_\_

Bank accounts:

Bank name: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Bank name: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Bank name: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Bank officer: \_\_\_\_\_ Phone / Email: \_\_\_\_\_

Investment accounts:

Company: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Company: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Company: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Company: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Company: \_\_\_\_\_ Account number & type: \_\_\_\_\_

Investment advisor: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Other information (please detail):

\_\_\_\_\_  
\_\_\_\_\_  
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## STEP 6: Share Your Plans

The final step of pre-planning your final arrangements is to share your plans with your family and loved ones—especially those who will carry out your final wishes.

- Go through this form and explain the details you have listed
- Add additional information that may be pertinent to your situation
- Discuss your wishes so your family is clear about your plans
- Make sure the pre-payment documents will be accessible at the time of your death and are not stored in a safe deposit box or other inaccessible location
- Make multiple copies and have more than one person who knows your arrangements

*It is our pleasure to provide this planning guide for you, and know the information you provide your family will be invaluable to them at the time it is needed.*

*If you are in need of a funeral service provider in the Wolfe City area, we invite you to consider R.W. Owens and Son Funeral Home, part of the Turrentine-Jackson-Morrow family of North Texas funeral homes and memorial parks.*



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