



Funeral Preplanning Guide for:

Add your name or your loved one's name above

Making important decisions today can bring comfort and confidence tomorrow.

Record Your Wishes • Organize Important Information • Ease Future Decisions



TABLE OF CONTENTS

Why Plan Ahead?	3
Funeral, Cremation & Memorial Options	4
Financial Planning Considerations	5
My Personal Information	6
Family Relationships & Contact Priorities	7
Funeral Instructions	8
Burial / Cremation Preferences	9
Military Service	10
Sharing Your Story	11
Obituary Information	12
Important Documents	13
Financial Information	14
Sharing Your Plan	15



Welcome to Your Personal Funeral Prearrangement Guide

Easy Planning & No Purchase Required!

Planning your funeral and final wishes in advance is one of the most caring gifts you can leave for your family. By making important decisions ahead of time, you can help reduce stress, ease uncertainty, and provide comfort to those you love most.

This Personal Planning Guide is designed to make the process simple and easy. Inside, you'll find a place to record important information, document your preferences, and create a plan that reflects your values, wishes, and unique life story.

Once completed, we encourage you to share your guide with a trusted family member or loved one and keep it in a safe, accessible location. Most importantly, make sure someone knows where to find it when the time comes.

Taking a few moments to plan today can provide greater peace of mind for you and your family tomorrow.

WHY PLAN AHEAD?

Planning in advance helps you:

- ✓ Protect the people you love
- ✓ Record your important preferences
- ✓ Make key decisions in advance
- ✓ Reduce future stress and uncertainty for your family

Planning today can bring greater peace of mind tomorrow.



FUNERAL, CREMATION & MEMORIAL OPTIONS

Understanding Your Choices

Every family is unique, and so is every final tribute. Understanding your options in advance can help you make informed decisions and create a meaningful plan that reflects your wishes.

Explore Your Options

- **Traditional Burial** – A service with visitation and burial.
- **Immediate Burial** – A simple burial without a formal ceremony beforehand.
- **Cremation with Memorial Service** – Cremation followed by a personalized gathering or tribute.
- **Cremation with Viewing** – A viewing or visitation held before cremation.
- **Graveside Service** – A ceremony held at the cemetery.
- **Celebration of Life** – A personalized event focused on honoring a life well lived.

Your Family1 agent can help explain each option and guide you toward the choices that best honor your wishes and fit your family's needs.



FINANCIAL PLANNING CONSIDERATIONS

Preparing Financially

When planning funeral arrangements in advance, it is important to consider not only personal wishes but also the financial impact on loved ones. Thoughtful financial planning can help ensure that funds are available when needed and reduce future stress for family members.

- 1. Establishing a Realistic Budget**
Begin by understanding the types of services and merchandise you may want included in your arrangements.
- 2. Considering Inflation and Future Costs**
Funeral expenses may increase over time due to inflation and rising costs of goods and services.
- 3. Evaluating Funding Options**
There are several ways to fund funeral arrangements.
- 4. Assessing Affordability**
A prearrangement plan should complement your overall financial picture.
- 5. Protecting Family Members from Financial Burden**
One of the primary reasons people preplan is to help reduce financial pressure on loved ones.
- 6. Reviewing Existing Insurance and Assets**
Many individuals already have resources that may help with final expenses.
- 7. Coordinating with Estate Planning**
Funeral planning works best when coordinated with other end-of-life planning documents.

This section is intended for educational purposes only and is not financial, legal, or insurance advice.

MY PERSONAL INFORMATION

Your loved ones will need the following information to help complete your death certificate.

First Name: _____ Middle: _____ Last: _____

Suffix: (SR.,JR.,III, etc.) _____ Sex: _____ Race: _____

Address: _____ City: _____ State: _____ Zip: _____

Date of Birth: _____ City & State of Birth: _____

Education Level Completed: (required by state) _____ Social Security #: _____

Occupation: (former, if retired) _____

Your Maiden Name: _____

Father's Name: (first, middle, last) _____ Birthplace: _____

Mother's Maiden Name: (first, middle, last) _____ Birthplace: _____

Marital Status: ☐ Married ☐ Never Married ☐ Widowed ☐ Divorced

Spouse/Domestic Partner Name: _____

Wedding Date & Place: _____

In the Community Since: _____

Organization Memberships: _____

Church Affiliation: _____

High School Attended: _____ Class of: _____

College or University Attended: _____ Class of: _____

YOUR CHILDREN				
FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH	CITY & STATE OF BIRTH

FAMILY RELATIONSHIPS & CONTACT PRIORITIES

This worksheet can help ensure your loved ones know who should be contacted and involved when important decisions need to be made.

Contact Priority Designations- Please indicate each person's role.

Primary Contact - First person to be notified and primary point of communication.

Secondary Contact - Alternate contact if the primary contact cannot be reached.

Family Representative - Individual designated to assist with funeral arrangements and final wishes.

Emergency Contact - Person to contact in case of emergency.

[illegible]

FUNERAL INSTRUCTIONS

Record your final wishes below to assist your grieving family in making the final arrangements you desire. This information will provide a “road map” your loved ones can follow to memorialize your life.

Place of Service: Chapel: _____ Church: _____ Other: _____

Type of Disposition: ☐ Burial ☐ Cremation ☐ Entombment ☐ Expatriation (Transfer to Another Country)

Minister/Clergy: _____

Favorite Bible/Literary Passage: _____

Favorite Music Selections: _____

Flag: ☐ Folded ☐ Draped Casket ☐ Presented to: _____

Clothing Preferences: ☐ From current wardrobe ☐ New

Clothing Description

☐ Stays On

☐ Returns to Family

Jewelry Description

☐ Stays On

☐ Returns to Family

Other/ Description

☐ Stays On

☐ Returns to Family

Flower Preferences: _____ Color: _____

Alternate Flower Selection: _____ Color: _____

Memorial Donation Preferences (In Lieu of Flowers): _____

Casket Open During Visitation: ☐ Yes ☐ No

During Service: ☐ Yes ☐ No

Other Notes: _____

PALLBEARER INFORMATION

NAME	RELATIONSHIP	CITY/STATE	PHONE

BURIAL/CREMATION DETAILS

Choose a special place of lasting remembrance where family and friends can visit and reflect.

BURIAL:

☐ Traditional Ground Burial

☐ I have purchased a plot in: Section: _____ Lot: _____ Space: _____

☐ I have not purchased a plot

☐ Interred in a Mausoleum

☐ I have purchased a crypt

☐ I have not purchased a crypt

☐ Natural Burial (Uses biodegradable materials and minimizes environmental impact.)

☐ Other Special Instructions: _____

CREMATION:

☐ Interred in a Mausoleum (niche)

☐ Buried next to my spouse/family in: Section: _____ Lot: _____ Space: _____

☐ Scattered

Location: _____

Special Instructions: _____

OTHER: _____

I, _____ have personally provided this information on ____/____/____
so that my loved ones are spared inconvenience at the time of my death. I have recorded vital
statistics and the location of important documents, which will be needed to settle my affairs. Please
keep this document on file and share it with my family, so that everything will be conducted in
accordance with my wishes.

SIGNATURE

DATE

WITNESS SIGNATURE

DATE

MILITARY SERVICE INFORMATION

Branch: _____ Years of Service: _____ Discharge Date & Place: _____

Date Entered: _____ Place of Entry: _____

Type of Separation or Discharge of Service: _____ Date: _____

Place of Discharge: _____

Location of Military Discharge Papers (DD 214): _____

Highest Grade, Rank or Rating Received: _____

Wars/Conflicts Served: _____

Additional Information/Medals/Honors/Citations: _____

Other Military Information: _____

VETERANS ADMINISTRATION*

If you are an honorably discharged veteran, your survivors may be eligible for a wide range of benefits. Information on a wide variety of topics may be obtained by calling **(800) 827-1000** or on the Internet at www.va.gov. For specific information about your benefits, have your VA number available for the benefits counselor when you call.

* Texas Service Life Insurance Company is neither endorsed by nor affiliated with any government agency, including the Social Security Administration and the Department of Veterans Affairs.



SHARING YOUR STORY

Your life is made up of meaningful moments, cherished relationships, and experiences that deserve to be remembered. Taking time to document your personal legacy helps preserve your memories, values, and the impact you've made on those you love.

Hobbies and passions: _____

Favorite activities: _____

Special talents: _____

Causes or charities important to you: _____

Life lessons you would like remembered: _____

Favorite sayings, quotes, or words of wisdom: _____



OBITUARY INFORMATION

An obituary serves as a lasting tribute to your life and helps inform family, friends, and the community about your passing, funeral services, and legacy. Providing this information in advance can help your loved ones create a meaningful and accurate obituary while reducing stress during a difficult time.

Basic Information

Full Legal Name: _____ Preferred Name or Nickname: _____

Date of Birth: _____ Place of Birth (City, State): _____

Family Information

Father's Name: _____ Mother's Name (including maiden name): _____

Name of Current or Late Spouse: _____

Names of Children and their Spouses/Partners: _____

Names of Grandchildren: _____

Professional achievements

Awards received: _____

Preceded in Death By (name/relationship/city & state): _____

Survived By (name/relationship/city & state): _____

Final Message

If desired, write a brief personal message to be included in your obituary or shared with family and friends.

IMPORTANT DOCUMENTS

Your family or your Executor/Administrator will need to gather a variety of documents following your death in order to settle your affairs. Recording the location of these key documents can simplify the process and make it less stressful for your loved ones.

Checklist:

Document	Located In
☐ Birth certificate	
☐ Marriage certificate	
☐ Military discharge papers	
☐ Insurance policies	
☐ Will or trust	
☐ Financial accounts	
☐ Property or Estate records	
☐ Digital accounts and passwords	
☐ Funeral Preplanning Guide	
☐ Funeral Contract	
☐ Insurance Policy	
☐ Power of Attorney documents	

Social Security Benefits for Surviving Family Members*

Your family should notify the Social Security Administration (SSA) as soon as possible after your death.

What Your Family Should Know

- A surviving spouse or eligible family member may qualify for certain Social Security survivor benefits.
- Eligibility and benefit amounts depend on factors such as age, relationship to the deceased, work history, and current family circumstances.
- Benefits are not paid automatically and may require an application through the Social Security Administration.
- Information Your Family May Need:
 - Social Security Number
 - Certified Death Certificate
 - Recent W-2 forms or self-employment tax records
 - Marriage License (surviving spouse)
 - Divorce Decree (surviving divorced spouse)
 - Children's Birth Certificates

It is a good idea to check your record every three years to make sure that earnings are being correctly reported to your record.

Social Security Administration

TOLL-FREE: (800) 772-1213

ONLINE: www.ssa.gov

* Texas Service Life Insurance Company is neither endorsed by nor affiliated with any government agency, including the Social Security Administration and the Department of Veterans Affairs.

FINANCIAL INFORMATION

Your family or your Executor/Administrator will need information about your assets after your death. Simplify the process by compiling your asset information below.

BANK		
ACCOUNT TYPE	BANK NAME	DOCUMENT LOCATION
Safe Deposit Box		
Savings		
Money Market		
Certificate of Deposit Maturity Date: _____		
IRA		
Roth IRA		

INVESTMENT		
ACCOUNT TYPE	INSTITUTION NAME	DOCUMENT LOCATION
Brokerage Account Contact Name & Phone #		
Mutual Fund Account Contact Name & Phone #		
Investment/ Other Contact Name & Phone #		

PROPERTY		
TYPE	LENDER	DOCUMENT LOCATION
1st Mortgage		
2nd Mortgage		
Home Equity Loan		
Reverse Mortgage		
Real Estate/ Other		
Auto		
Auto		
Other		
Other		

SHARING YOUR PLAN

A well-prepared funeral plan provides greater peace of mind—not only for you, but for the loved ones who may one day carry out your wishes. This section offers practical guidance on how to communicate your preferences.

Talking with Family about your wishes

Consider sharing:

- Your preferences for burial, cremation, or other disposition options
- The type of service you would like (traditional funeral, memorial service, celebration of life, religious service, etc.)
- Any special readings, music, cultural traditions, or personal touches you would like included
- Your reasons behind certain decisions, which can help loved ones better understand your wishes

Informing decision-makers

It is important that the individuals who may be responsible for carrying out your plans know where to find information and understand their role.

Consider informing:

- Your spouse or partner
- Adult children
- Executor of your estate
- Power of Attorney representative
- Trusted family members or friends
- Your chosen funeral home

Reviewing and updating your plans

Life changes, and your funeral plans may change as well. Reviewing your plan periodically helps ensure it continues to reflect your wishes.

You may want to revisit your plan after:

- Marriage or divorce
- Birth of children or grandchildren
- Relocation to a new city or state
- Changes in health
- Death of a spouse or designated decision-maker
- Changes in religious or personal preferences
- Updates to estate planning documents

A good practice is to review your plan every two to three years, even if no major life changes have occurred. Taking the time to communicate your wishes today can help spare your loved ones that uncertainty tomorrow.

Greater peace of mind comes not only from making a plan—but from sharing it with those who matter most.





RESOURCES FOR HEALING, HOPE AND SUPPORT

Losing someone you love can bring many emotions, including sadness, uncertainty, loneliness, gratitude, and moments of peace. Grief is a personal journey, and there is no right or wrong way to experience it.

Scan the QR Code

Access grief support resources, educational materials, and helpful information that can provide comfort and guidance as you move through the healing process.

www.family1.com

