

Funeral Planning Checklist



FUNERAL PLANNING CHECKLIST AND PRICE COMPARISON SHEET

Planning a funeral is a huge job; some say that planning a wedding is easier than planning a funeral and most weddings take months to plan. Now here you are with little time, an unknown budget and countless decisions to make. Many people rely on funeral directors because they won't let you forget anything. But the problem with letting funeral directors help you is that you lose control over the funeral and end up spending more than you need or want to spend. This checklist is a complete funeral-planning guide that will save you thousands of dollars no matter what type of funeral you choose.

NO CULTURE OR RELIGION ENCOURAGES EXPENSIVE FUNERALS

There is no mandate that says you must honor your loved one in a particular way. There are many ways to pay tribute to your loved one and all of them can be done within a reasonable budget and in keeping with your religious, personal or cultural beliefs. Remember that neither the community nor your belief system encourages elaborate final arrangements. The amount you spend does not equal the love you had for the deceased. As a matter of fact, if you think about it, your loved one would not want you to go into debt to pay for a funeral. Taking a leadership role in the planning of the funeral is more meaningful for you and the your loved one than

how much money you spend.

CHOOSE WHAT IS BEST FOR YOU AND YOUR LOVED ONES

The traditional funeral as we know it in the U.S is a relatively recent development that gets you to buy goods and services you don't need. The traditional funeral in a funeral home calls for unnecessary and invasive preservation of the body with embalming, elaborate caskets, and expensive goods and services. This type of service has no basis in religion or culture; it only started from a commercialized funeral industry. Every family has the right to choose what is best for them. In this economic climate, what is best for most families is not to spend wildly on overpriced items.

KNOW YOUR RIGHTS

If a traditional funeral with the ornate casket, embalming and public viewing is what you really want for your loved one, by all means, go ahead and arrange it. But do so with the knowledge that shopping around for ethical and reasonable funeral directors is your right. Purchasing caskets and other goods and services from less expensive sources is your right. Saying no to embalming is your right. You have the power to choose the things your loved one would have wanted without spending a fortune. You have the right to shop around for the best deal and you have the right to ask questions and get what you truly want, not what some funeral

director dictates you need.

FUNERALS ARE FAMILY MATTERS

Whenever possible, begin your funeral planning with family. Discuss the vision you have for the funeral and what the deceased would have wanted. There is no right and wrong way to plan or hold a funeral, but discussing your ideas before you begin to make calls and purchases will help to make a difficult time much easier to bear. If you discuss ideas with the family, a picture of how you want the funeral to look and how much money there is to spend will help shape your decisions later. In addition, some family members may have had an intimate discussion with the deceased about their final wishes and this will give them an opportunity to share them with you.

CHOOSE THE TYPE OF FUNERAL YOU WANT

Decide what your loved one would have wanted and what your family feels is appropriate. Go through this checklist and get a sense of all the details you would like to include in the funeral. Start off with all the choices you would like to select, you can always pair it down later if budget, time or personal preference becomes a factor.

DETERMINE YOUR BUDGET

If you have the time to plan for a home funeral, you will be saving so much money that you probably won't have to determine a budget, sometimes a few hundred dollars is all you need. However, if you are planning a funeral with a funeral director, you will definitely need to determine your budget. Always have a figure in your head of what you can truly afford before contacting funeral homes for price lists. Sitting down with a funeral director before determining a budget is one of the ways funerals end up costing over 12,000.00 + disposition fees. Don't let the funeral director decide what you need by using your emotions against you.

SHOP AROUND

Once you have determined your budget, you need to find the funeral home or funeral director and goods and services that you can afford within your budget. Even if some of the prices are out of your budget, you will be able to get similar or better products online or at other funeral retailers. Make sure you get prices from third party suppliers as well as funeral homes.

Choosing a funeral home or funeral director based on anything but price is foolhardy. Contact at least three funeral homes for General Price Lists and other prices before you make a decision and certainly before you release the deceased to any one of them.

Another way to save money is to have the family take responsibility for certain things. Perhaps your nephew is good with photos and can set up a slide show or maybe your cousin in graphic design can create a program at just the price of the paper. The more involved the family is, the lower the cost of the funeral.

HOW TO USE THIS CHECKLIST

The following checklist will take the guesswork out of planning a funeral. On the left you will find a list of documents, tasks, goods and services that you will have to gather, do or purchase when planning for your loved one's funeral. It is a comprehensive list that goes into great detail. You'll find everything from big-ticket items you'll have to consider purchasing to small jobs you will want to delegate to family and friends.

In the columns to the right of the tasks, you will find spaces to check 'yes' or 'no' beside a good or service. I suggest going through and checking 'yes' beside all the things you think you might need or want. If you do this first, it will give you an idea of what is truly important to you and to see how much work is involved in a funeral.

The next columns will allow you to assign each task to a specific person, and check off whether or not it has been done. This will help you to keep track of who is in charge of what. You can make notes on their progress,

where they will store the goods, which service provider they've chosen or where to find the information.

Under the categories that require you to contact different suppliers and funeral homes for prices, there is room for you to record and compare three prices from three different suppliers or funeral homes. At the end of the checklist you can enter in the totals and make some notes about which supplier or funeral home you want to work with.

PRINT OUT THIS CHECK LIST

The earlier you plan and the more you plan keeps you from making mistakes, omitting important details or over paying on funeral goods and services. Print out this check list and have it with you as you make your calls to funeral homes, when you research caskets or urns online and when you are with your family discussing the final arrangements for your loved one. Keep all of your funeral planning information together in one file and make sure that family are aware of the funeral plan.

Funeral Planning Checklist

| Task | Do you want it? | | Has it been completed? | Task assigned to whom? | Notes |
|--|-----------------|----|------------------------|------------------------|-------|
| | Yes | No | | | |
| Locate Documents | | | | | |
| Letter of funeral directive | | | | | |
| Will | | | | | |
| Birth certificate | | | | | |
| Marriage certificate | | | | | |
| Insurance policies | | | | | |
| Bank records | | | | | |
| Deeds to property | | | | | |
| Vehicle ownership | | | | | |
| Military discharge papers | | | | | |
| Citizen papers | | | | | |
| Tax returns | | | | | |
| Gather the following information for the death certificate and funeral planning | | | | | |
| Full name of deceased | | | | | |
| Occupation | | | | | |
| Employment or business history | | | | | |
| Date of birth | | | | | |
| Place of birth | | | | | |
| Date of death | | | | | |
| Place of death | | | | | |

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|--|-----------------|----|------------------------|------------------------|-------|
| | Yes | No | | | |
| Citizenship | | | | | |
| Social security number | | | | | |
| Residence address | | | | | |
| Length of time at current residence | | | | | |
| Spouse's full name or maiden name | | | | | |
| Marital history | | | | | |
| Father's name | | | | | |
| Father's birthplace | | | | | |
| Father's birth date | | | | | |
| Father's date of death | | | | | |
| Mother's maiden name | | | | | |
| Mother's birthplace | | | | | |
| Mother's birth date | | | | | |
| Mother's date of death | | | | | |
| Place of burial or cremation | | | | | |
| If a veteran, discharge papers | | | | | |
| Next of kin, addresses, relationship | | | | | |
| Executor's name and contact information | | | | | |
| Attorney's name and contact information | | | | | |
| Pre-planning documents with funeral home and cemetery that might exist | | | | | |

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|---|-----------------|----|------------------------|------------------------|-------|
| | Yes | No | | | |
| Death certificate, burial, removal and transit permit | | | | | |
| Title to burial plot | | | | | |
| After the Funeral, Contact These People and Organizations | | | | | |
| Attorney for transferring assets and probating the will | | | | | |
| Accountant or tax offices to find out what taxes are to be filed | | | | | |
| Banks and credit unions to locate safety deposit boxes and accounts | | | | | |
| Insurance agents to obtain claim forms | | | | | |
| Social Services to learn about benefits | | | | | |
| Social Security to stop monthly checks | | | | | |
| Veterans Affairs | | | | | |
| Power of attorney to stop their responsibilities | | | | | |
| Creditors to pay outstanding balances | | | | | |
| Utility companies to discontinue services | | | | | |
| Employer of deceased to learn about benefits | | | | | |
| Newspapers and magazines to stop subscriptions | | | | | |
| Post Office to forward mail | | | | | |
| Close computer accounts | | | | | |

Funeral Planning Checklist

| Task | Do you want it? | | Funeral Home or Supplier #1 Price | Funeral Home or Supplier #2 Price | Funeral Home or Supplier #3 Price | Task assigned to whom? | Notes |
|--|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Decide on Disposition Options | | | | | | | |
| Burial | | | | | | | |
| Burial Clothing, Jewelry, Makeup | | | | | | | |
| Cremation | | | | | | | |
| Donation to medical research | | | | | | | |
| Donation to scientific research | | | | | | | |
| Other | | | | | | | |
| Decide on Funeral Services | | | | | | | |
| Public viewing | | | | | | | |
| Private viewing | | | | | | | |
| Visitation | | | | | | | |
| Memorial service | | | | | | | |
| Graveside service | | | | | | | |
| Cremation service | | | | | | | |
| Home Funeral | | | | | | | |
| Contact or Notify Friends and Relatives | | | | | | | |
| Phone, email, announcement | | | | | | | |
| Death notice | | | | | | | |
| Obituary | | | | | | | |

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|--|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Obituary photo | | | | | | | |
| For Home Funerals Gather These Supplies | | | | | | | |
| A bed or table for the deceased | | | | | | | |
| Bowls and basins | | | | | | | |
| Mouthwash, vinegar and cotton swabs | | | | | | | |
| Plastic sheeting or plastic shower curtains | | | | | | | |
| Washcloths, towels | | | | | | | |
| Soap, shampoo, conditioner, hand cream | | | | | | | |
| Essential oils (lavender is a good choice) | | | | | | | |
| Scissors | | | | | | | |
| Scarf | | | | | | | |
| Adult diapers | | | | | | | |
| 40-50 lbs of dry ice and proper storage container | | | | | | | |
| Towels and blankets to wrap around the dry ice | | | | | | | |
| Leather gloves, hammer and chisel for handling and cutting dry ice | | | | | | | |
| Latex gloves | | | | | | | |
| Bedding for display | | | | | | | |
| Truck or van for transporting the deceased | | | | | | | |

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|---|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Clothing or shroud to dress the deceased | | | | | | | |
| Flowers, candles and personal effects for display | | | | | | | |
| Table, chair and lamp | | | | | | | |
| Bible, favorite book, music | | | | | | | |
| Casket | | | | | | | |
| Shroud | | | | | | | |
| Urn | | | | | | | |
| Contact Funeral Homes for prices of goods and services | | | | | | | |
| Immediate burial | | | | | | | |
| Immediate cremation | | | | | | | |
| Basic Service Fee for the funeral director and staff | | | | | | | |
| Transport of body | | | | | | | |
| Embalming | | | | | | | |
| Cosmetics | | | | | | | |
| Clothing | | | | | | | |
| Visitation/viewing — staff and facilities | | | | | | | |
| Funeral or memorial service — staff and facilities | | | | | | | |
| Graveside service, including staff and equipment | | | | | | | |

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|--|-----------------|----|-----------------------------------|-----------------------------------|-----------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Hearse | | | | | | | |
| Other vehicles | | | | | | | |
| Least expensive casket price | | | | | | | |
| Description, including model # | | | | | | | |
| Outer burial container (vault) price | | | | | | | |
| Description, including model # | | | | | | | |
| Urn Prices | | | | | | | |
| Description, including model # | | | | | | | |
| Other Funeral Director's Services | | | | | | | |
| Forwarding body to another funeral home | | | | | | | |
| Receiving body from another funeral home | | | | | | | |
| Cost of lot or crypt | | | | | | | |
| Perpetual care of final resting place | | | | | | | |
| Opening and closing the grave or crypt | | | | | | | |
| Grave liner or vault | | | | | | | |
| Marker/monument | | | | | | | |
| Set up of grave marker or monument | | | | | | | |
| Music | | | | | | | |
| Favorite music | | | | | | | |

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|------------------|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Hymns | | | | | | | |
| Musicians | | | | | | | |
| CD's | | | | | | | |
| Speakers | | | | | | | |
| Readings | | | | | | | |
| Scripture | | | | | | | |
| Poems | | | | | | | |
| Eulogies | | | | | | | |
| Food / Catering | | | | | | | |
| Menu | | | | | | | |
| Drinks | | | | | | | |
| Napkins | | | | | | | |
| Cutlery | | | | | | | |
| Cups | | | | | | | |
| Coffee Tea | | | | | | | |
| Funeral Programs | | | | | | | |
| Prayer Cards | | | | | | | |
| Order of Service | | | | | | | |
| Obituary | | | | | | | |

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|-----------------------|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Photos | | | | | | | |
| Prayers/Readings | | | | | | | |
| Design | | | | | | | |
| Printing | | | | | | | |
| Memorial Items | | | | | | | |
| Photos | | | | | | | |
| Frames | | | | | | | |
| Slideshow | | | | | | | |
| DVD | | | | | | | |
| Memorial video | | | | | | | |
| Memorial website | | | | | | | |
| Ushers | | | | | | | |
| Guest register book | | | | | | | |
| Direct traffic | | | | | | | |
| Coat check | | | | | | | |
| Distribute progams | | | | | | | |
| Pallbearers | | | | | | | |
| Six-Eight people | | | | | | | |

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|---|-----------------|----|--------------------------------------|--------------------------------------|--------------------------------------|------------------------|-------|
| | Yes | No | | | | | |
| Flowers | | | | | | | |
| Deceased's favorite | | | | | | | |
| Flower arrangements | | | | | | | |
| Cars | | | | | | | |
| Hearse/station wagon, van for transporting deceased | | | | | | | |
| Pallbearer car | | | | | | | |
| Family car | | | | | | | |
| Flower car to transport flowers | | | | | | | |
| Clergy or officiate car | | | | | | | |
| Facility Set Up | | | | | | | |
| Tables | | | | | | | |
| Chairs | | | | | | | |
| Table cloths | | | | | | | |
| Flowers | | | | | | | |
| Mementos | | | | | | | |
| Tent | | | | | | | |
| People to help | | | | | | | |
| Clergy to say a few words | | | | | | | |
| Master of Ceremonies | | | | | | | |

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| | Yes | No | | | | | |
| Water plants, refresh flowers and replace and light candles | | | | | | | |
| Answer phones and the door at the home of the deceased | | | | | | | |
| Stay with the person closest to the deceased to help divert prying questions | | | | | | | |
| Person to empty trash, pick up empty plates, water plants | | | | | | | |
| Childcare | | | | | | | |
| Pet care | | | | | | | |
| Lawn and yard care | | | | | | | |
| House cleaning | | | | | | | |
| Repairs | | | | | | | |
| Errand runner | | | | | | | |
| Food Coordinator for before, during and after the funeral | | | | | | | |
| Guest Coordinator help with out of town guests, hotels, etc | | | | | | | |
| Total costs | | | | | | | |