

Funeral Planning Checklist and Forms

General Preparation

- Notify authorities of the death if it has occurred outside a hospital, hospice, or nursing home
- Assemble personal information for death certificate and obituary *(see personal information form at the end)*
- Notify family and friends
- Determine/find and read the Will
- Request multiple copies of the death certificate
- Choose a charity for donations in lieu of flowers *(if desired)*
- Gather photos and memorabilia for display
- Gather cemetery information such as deed to the plot and receipt of purchase
- Consider your catering/food options for after the funeral procession

People Preparation

- Select Pallbearers *(usually 4-6)*
- Select Clergy *(if desired)*
- Select Speakers for the Eulogy *(family, friends, or clergy are common speakers)*
- Determine who is the primary organizer
- Determine who will take charge of the finances and bills for services rendered

Funeral Preparation

- Determine the Funeral Home *TIP: Use our easy search and sort functionality to narrow down your options.*
- Determine Ceremony Type
 - Traditional Burial
 - Cremation
 - Embalming
 - Direct Cremation
- Clothing Provide Buy
- Jewelry Bury Remove *(this can include pins, cufflinks, tie tacks and other special personal effects)*
- Visitation/Viewing/Wake Funeral Service Graveside Service Memorial Service

When _____

Where _____

- Flowers
 - Casket Spray
 - Standing Spray
 - Lid Arrangement
 - Other _____

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Deceased Personal Information

(can be used for preparation of the obituary and official documents)

Full Name _____

Social Security Number _____

Date of Birth _____

Age _____

Marital Status _____

Date of Death _____

Parents' Name _____

Place of Work _____

Insurance Company _____

Policy Number _____

Military Service _____

Organizational Affiliations

1. _____

4. _____

2. _____

5. _____

3. _____

6. _____

Notes

Funeral Planning Checklist and Forms

Other Items To Note

Bank Accounts

1. _____

4. _____

2. _____

5. _____

3. _____

6. _____

Credit Cards

1. _____

4. _____

2. _____

5. _____

3. _____

6. _____

Retirement Accounts

1. _____

2. _____

Housing

Landlord/Rent

Mortgage

Utility Companies

1. _____

4. _____

2. _____

5. _____

The Funeral Rule

(reprinted from the Federal Trade Commission website)

The Funeral Rule, enforced by the Federal Trade Commission (FTC), makes it possible for you to choose only those goods and services you want or need and to pay only for those you select, whether you are making arrangements when a death occurs or in advance. The Rule allows you to compare prices among funeral homes, and makes it possible for you to select the funeral arrangements you want at the home you use. (The Rule does not apply to third-party sellers, such as casket and monument dealers, or to cemeteries that lack an on-site funeral home.)

Your Rights Under the Funeral Rule

The Funeral Rule gives you the right to:

Buy only the funeral arrangements you want. You have the right to buy separate goods (such as caskets) and services (such as embalming or a memorial service). You do not have to accept a package that may include items you do not want.

Get Price Information on the telephone. Funeral directors must give you price information on the telephone if you ask for it. You don't have to give them your name, address, or telephone number first. Although they are not required to do so, many funeral homes mail their price lists, and some post them online.

Get a written, itemized price list when you visit a funeral home. The funeral home *must* give you a General Price List (GPL) that is yours to keep. It lists all the items and services the home offers, and the cost of each one.

See a written casket price list before you see the actual caskets. Sometimes, detailed casket price information is included on the funeral home's GPL. More often, though, it's provided on a separate casket price list. Get the price information *before* you see the caskets, so that you can ask about lower-priced products that may not be on display.

See a written outer burial container price list. Outer burial containers are *not required by state law anywhere in the U.S.*, but many cemeteries require them to prevent the grave from caving in. If the funeral home sells containers, but doesn't list their prices on the GPL, you have the right to look at a separate container price list *before* you see the containers. If you don't see the lower-priced containers listed (such as a liner vs. a vault), ask about them.

Receive a written statement after you decide what you want, and before you pay. It should show exactly what you are buying and the cost of each item. The funeral home must give you a statement listing every good and service you have selected, the price of each, and the total cost immediately after you make the arrangements.

Get an explanation in the written statement from the funeral home that describes any legal cemetery or crematory requirement that requires you to buy any funeral goods or services.

Use an "alternative container" instead of a casket for cremation. *No state or local law requires the use of a casket for cremation.* A funeral home that offers cremations must tell you that alternative containers are available, and must make them available. They might be made of unfinished wood, pressed wood, fiberboard, or cardboard.

Provide the funeral home with a casket or urn you buy elsewhere. The funeral provider *cannot refuse to handle a casket or urn* you bought online, at a local casket store, or somewhere else - or charge you a fee to do it. The funeral home *cannot require you to be there when the casket or urn is delivered to them.*

Make funeral arrangements without embalming. No state law requires routine embalming for every death. Some states require embalming or refrigeration if the body is not buried or cremated within a certain time; some states don't require it at all. In all cases, refrigeration is an acceptable alternative. In addition, you may choose services like direct cremation and immediate burial, which don't require any form of preservation. Many funeral homes have a policy requiring embalming if the body is publicly viewed, but *this is not required by law in most states.* Ask if the funeral home offers private family viewing without embalming. If some form of preservation is a practical necessity, ask the funeral home if refrigeration is available.