

# Information Needed for Pre-Planning

Pre-planning allows you to make thoughtful decisions in advance and helps ease the emotional burden on your loved ones. To begin the process, the following information is helpful:

## **Personal Information**

- Full legal name
- Date and place of birth
- Social Security number
- Current address and contact information
- Marital status and spouse's name (if applicable)
- Parents' names (including mother's maiden name)

## **Family & Next-of-Kin Information**

- Names and contact information for children, siblings, or other next of kin
- Designated decision-maker or power of attorney (if applicable)

## **Military Information (if applicable)**

- Branch of service
- Service number or Social Security number
- Discharge papers (DD-214), if available
- Rank and dates of service

## **Service Preferences**

- Burial or cremation preference
- Type of service (funeral, memorial, graveside, or celebration of life)
- Preferred location (funeral home, church, cemetery, or other venue)
- Religious or cultural traditions to be observed
- Music selections, readings, or special requests

## **Cemetery & Disposition Information**

- Cemetery name and location (if owned)
- Plot information
- Vault or urn preferences
- Headstone or marker details (if applicable)

#### **Financial & Administrative Information**

- Pre-need insurance or funeral policy information
- Preferred payment arrangements
- Executor or estate contact information (if available)

#### **Additional Wishes**

- Obituary preferences
- Pallbearer selections
- Memorial donations or charitable requests
- Special instructions for family or loved ones

---

Our staff is here to guide you through every step of the pre-planning process with care and respect. If you have questions or need assistance, please contact us—we are honored to help.