



RetiringNowWhat.com

A Single Point Resource of Activity, LifeStyle, Living & Planning Service Providers

Activities & LifeStyle

Planning

Daily Living

Advanced Life Care

Medical

Transitional

D/O/B

Planning Your Funeral is One of the Greatest Gifts of Love you will ever give!

Please visit: RetiringNowWhat.com

FIRST NAME

To quickly find Funeral Service Providers in your area.

All questions contained help gather vital personal and family information. The document is not meant to replace the professional guidance of a Licensed Funeral Director can provide.

This document is a tool to outline your wishes, present this form when speaking with your Funeral Director, Preplanning Counselor or Elder Law Attorney.

LAST NAME

The Family Planning Form is Provided by
RetiringNowWhat.comTM, LLC.



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Personal Information	Spouse
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Maiden Name	Maiden Name
Nick Name	Nick Name
<hr/>	
Date of Birth	Date of Birth
Place of Birth	Place of Birth
State	State
County	County
Country	Country
<hr/>	
Date of Death	Date of Death
City	City
State	State
County	County
Country	Country
<hr/>	
Marital Status <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Single <input type="checkbox"/> Widowed	
Anniversary Date	

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Children's Names	Children's Spouses Name	
Grand Children's Names		
	Fathers Name	
	Place of Birth	
	Date of Birth	Date of Death
	Mothers Name	
	Mothers Maiden Name	
	Place of Birth	
	Date of Birth	Date of Death



Military Record

Legal Address

Branch of Service <input type="checkbox"/> U.S. NAVY <input type="checkbox"/> U.S. MARINE <input type="checkbox"/> U.S. ARMY <input type="checkbox"/> U.S. AIR FORCE <input type="checkbox"/> U.S. COAST GAURD <input type="checkbox"/> U.S. MERCHANT MARINE		Address	
<input type="checkbox"/> Enlisted <input type="checkbox"/> Officer Rank	City	State	
Service Number		Postal Code	
Enlistment/Commissioning Date			
Discharge Date			
Discharge Papers (DD-214) Attached <input type="checkbox"/> YES <input type="checkbox"/> NO		Educational History	
Special Awards		Elementary School	Years Attended
For Military Burial and Honors a Copy of your DD-214 will be required.		Jr High School	Years Attended
Burial Vaults Many cemeteries require a minimum grave liner this is a basic concrete box up to vaults that have warranties. The prices start under \$1000 in-excess of \$25,000 Veterans may receive a minimum Burial Vault at no charge check with your VA or Local VFW for that benefit. Veterans Administration 1-800-827-1000. The Burial Schedule Office for National Cemeteries 1-800-535-1117 YOUR DD-214 is REQUIRED to obtain benefits		High School	Years Attended
		College/University/Trade School	



Legal Information

If you have not establish a relationship with an Elder Law Attorney Please visit: ElderLawin.com one of our Service Provider Sites to locate a qualified Elder Law Attorney

Financial Information

Bank Name
 Address
 City State

Attorneys Name	Phone
Phone	Branch Managers Name
Address	Phone
City	Do you have additional banks? <input type="checkbox"/> Yes <input type="checkbox"/> No
State	
Postal Code	Financial Advisors Name
Do you have a Will, Trust or Estate Established with this Attorney. <input type="checkbox"/> YES <input type="checkbox"/> NO	Firm Name Phone Address
Date Last Updated	City State
Do you have a safe deposit box <input type="checkbox"/> YES <input type="checkbox"/> NO Location	Insurance Policies Company Name Policy # Policy Amount

USE REVERSE IF ADDITIONAL SPACE IS NEEDED

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The Funeral Plan

The next section of the Form is to outline your personal wishes prior to meeting with the Funeral Director or Funeral Planning Professional. Your time and personal attention will help prevent emotional overspending.

<p>Information Contained</p> <ul style="list-style-type: none"> • Type of Funeral <ul style="list-style-type: none"> • Length of Funeral Visitation • Service Outline • Personal Instructions <ul style="list-style-type: none"> • Memorial Contributions • Personal Items 	<ul style="list-style-type: none"> • Pall Bearers' • Special People to Contact • Personal Photo • Personal Quote • Post Service Meal • Special Notes
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As a reminder ONLY a Funeral Professional can fully explain and insure all your wishes are expressed. Nothing can fully replace a personal discussion with a Funeral Professional.

Personal Instruction

This area is to outline personal items that represent your life that include wedding ring, personal items like a golf club.

These items can be placed in the casket with you or set out in the visitation area.

All personal items can be returned to family if you wish. Items such as a wedding ring, Bible or personal Jewelry should be returned to a specific person, the Funeral Director has spoken with items are generally returned following the Church Service or at the Cemetery.

Or can be picked up when family returns to pick up flowers.



Services Requested

Memorial Contributions

Special Music Some Funeral Homes will allow you to play personal music in the background.

This can be anything from the Red Cross to your Church or Synagogue

Vocalist

Organization Name

Organist

Readings

Personal Items

Readers
#1 Name
#2 Name

Wedding Ring
Return to Family Yes No

Please indicate any special verses you would like used in the service

Cross / Star of David
Return to Family Yes No
Personal Jewelry
Return to Family Yes No

Flowers

Glasses Return to Family Yes
 No Donate

Contributions in lieu of flowers

Bible /Torah
Return to Family Yes No

Video

Hobby Items
Return to Family Yes No

Power Point

Photo Albums

Other

Letters



Pall Bearers'

Special People to Contact

The Pall Bearer is a place of honor much like a wedding attendant/groomsmen. Normally 6-8 Pall Bearers' are involved with the service. Pall Bearers' can be family, friends or anyone you desire.

We suggest naming all those you consider. Naming people not in attendance is simply a demonstration of your feelings for those individuals.

We all have people for whatever reason we have lost contact with. The following people are those at a minimum you would like to be notified of your passing.

Please Watch an informative Video on our YouTube Channel RetiringNowWhat.com

Name
Relation

Name

Name
Relation

Phone

Name
Relation

E-Mail

Name
Relation

Relationship

Name
Relation

Name
Relation

Name

Name
Relation

Phone

Name
Relation

E-Mail

Relationship



Attach a Recent Photo

Post Service

Select your favorite photo, recent is preferred.

Formal Meal Informal Meal

Special Meal (Hot Dogs, Cup Cakes)

This Meal is in your Honor and it can be a reflection of you.

Personal Quote

Your personal motto

Special Notes

Did you have a phrase or a comment that will evoke a smile from those attending your Funeral?



Budget Planning

Funeral Service Prices vary this budget is only designed to assist in approximating your rough budget. THIS IS NOT A PRICE GUARANTEE NOR A CONTRACTUAL AGREEMENT THIS FORM IS ONLY FOR ESTABLISHING YOUR PERSONAL COMFORT.

It is a Federal Trade Commission Requirement that when asked a Funeral Home must provide a General Price List of Goods and Services. You can simply request one from the Funeral Home you intend on using. Some Funeral Homes offer Package deals! It is far more likely you can find and create a budget by speaking with a pre planning professional.

Other consideration should be taken such as Geographic location. The prices of a Funeral in New York is going to be much high than a Service in Texas. According to the National Funeral Directors Association indicate that the National average for a Funeral is over \$7,700.00 not including burial and secondary expenses for family needs, like travel, hotel and meals.

Additional end of life medical expenses may also be incurred.

<input type="checkbox"/>	Cremation Service	\$4,500	<input type="checkbox"/>	Travel for Family	\$3,500
<input type="checkbox"/>	Burial Service	\$7,500	<input type="checkbox"/>	Special Meal / Reception	\$2,500
<input type="checkbox"/>	Traditional Visitation Service	\$10,000	<input type="checkbox"/>	Final Medical Expenses	\$15,000
<input type="checkbox"/>	Cemetery Expenses (Opening & Closing)	\$3,500	<input type="checkbox"/>	Variable Costs	\$ _____



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Coverage Checklist

Amounts are suggestions only:

	Prices are only ranges	Your Budget Amount
Basic Funeral Services	\$1,500.00-\$8,000.00	
Caskets	\$1200.00-30,000.00	
Outer Burial Container	\$600.00-\$5,000.00	
Grave Site	\$600.00-\$5,000.00	
Opening & Closing of Grave	\$1200.00-\$2,500.00	
Grave Marker	\$150.00-\$10,000	
Flowers from immediate Family (Wife, Husband Kids)	\$250.00-\$500.00	
Securing Death Certificate Additional fees may apply for each additional Death Certificates	\$95.00-\$300.00	
Acknowledgement Cards	\$25.00-\$150.00	
Register Book	\$55.00-\$125.00	
Memorial/Folder/Prayer Cards	\$65.00-\$150.00	
Church Fees	\$50.00-\$500.00	
Priest/Pastor/Rabi	\$75.00-\$150.00	
Organist	\$150.00-\$275.00	
Bag Piper	\$150-\$350.00	
Special Meal / Reception following Service	\$500-\$3,500	
Final Medical Expenses	\$10,000-\$50,000	

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