Personal Planning

For the Unexpected

CHECKLIST

Resource provide by Trinity Point Church

Tragedy Planning Checklist

*Indicates details that can be planned or prepaid ahead of time

SECURE VITAL STATISTICS (Required for burial permit.)

1. *Name. home address and telephone number.

   _____

2. *How long in State.

   _____

3. *Name of business, address and telephone number.

   _____

4. *Occupation and title

   _____

5. *Social Security Number.

   _____

6. *War Veteran's Serial Number.

   _____

7. *Date of Birth

   _____

8. *Place of Birth

   _____

9. *U.S. Citizen

   _____

10 *Father's name

   _____

11. *Father's birthplaces

   _____

12. *Mother's birthplaces

   _____

13. *Mother's maiden name

   _____

14. *Religious names (if any)

   _____

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NOTIFY AS SOON AS POSSIBLE

15. Clergy

_____

16. The doctor or doctors

_____

17. The funeral director

_____

18. All relatives

_____

19. All friends

_____

20. Employer of deceased

_____

21. Employers of relatives not going to work.

_____

22. Casket bearers

_____

23. Insurance agents (life, health, and accident)

_____

24. Fraternal, Civic, Veterans Organizations, Unions

_____

25. Newspapers regarding notices

_____

26. Attorney, accountant, or executor of estate

_____

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DECIDE AND ARRANGE WITHIN A FEW HOURS

27. *Burial locations

_____

28. *Inscription on crypt front (Niche), gravestone

_____

29. *Casket type

_____

30. *Clothing for deceased

_____

31. *Type of service (religious, military, fraternal)

_____

32. *Special selection from scriptures

_____

33. *Music

_____

34. Clergy to officiate

_____

34. Which funeral director

_____

35. Place where service to be held

_____

36. Time for funeral service

_____

37. Decide name of church or charitable organizations for donations

_____

38. Provide information for eulogy

_____

39. Select names for pall bearers

_____

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DECIDE AND ARRANGE WITHIN A FEW HOURS (Cont.)

40. Flowers

_____

41. Preparation at home, including food for family and guests

_____

42. Extra chairs

_____

43. Transportation for family and guests, including planning funeral car list

_____

44. Checking and signing necessary papers for burial permit

_____

45. Providing vital statistics about deceased to newspapers

_____

46. Providing addresses and telephone numbers for all interested people

_____

47. Answering innumerable sympathetic phone calls, messages, etc.

_____

48. Meeting and talking with clergy, funeral director, cemetery representatives, about all details.

_____

_____

_____

49. Greeting all friends and relatives who call

_____

_____

_____

50. Arrangements for meeting relatives who arrive from out of state

_____

_____

_____

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DECIDE AND ARRANGE WITHIN A FEW HOURS (Cont.)

51. Providing lodging for out-of-town relatives

_____

_____

_____

52. Make list of callers, floral tributes and those who sent contributions for mailing cards of thanks

_____

_____

_____

53. Arranging for special religious or memorial services

_____

_____

_____

54. Consult the will regarding special wishes

_____

_____

_____

55. Order death certificate

_____

56. Look after minor children

_____

_____

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COLLECT DOCUMENTS

(Required to establish rights for insurance, pensions, social security, ownership, relationship, etc.)

57. *Will

_____

58. *Legal proof of age or birth certificate

_____

59. *Social Security card or number

_____

60. *Marriage licenses

_____

61. *Citizenship papers

_____

62. *Insurance policies (life, health, accident, and property)

_____

_____

_____

63. *Bank books

_____

64. *Deeds to property

_____

65. *Bill of sale of car

_____

66. *Income tax returns, receipts, or cancelled checks

_____

67. *Veteran's discharge certificates

_____

68. *Disability and pension claims

_____

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PAY SOME OR ALL OF THE FOLLOWING

69. Family burial estate

_____

70. Memorials

_____

71. Funeral director

_____

72. Entombment Service

_____

73. Musicians

_____

74. Florist

_____

75. Transportation

_____

76. Doctors

_____

77. Nurses

_____

78. Hospitals and ambulance

_____

79. Medicine and drugs

_____

_____

_____

80. Other current & urgent bills (mortgage/rent, taxes, installment payments)

_____

_____

_____