FinalExpense60

FREE CHECKLIST

The final arrangements checklist for your family

Gather it now so your family is not searching later

Tick each box as you find the item and write down where it is kept. Fill it in together with the person it is about, and share the location with one trusted person.

1. Papers to gather in one folder

- [ ] Birth certificate and Social Security card or number
- [ ] Marriage certificate, divorce decree, if any
- [ ] Military discharge papers (DD 214), if a veteran
- [ ] Will, power of attorney and health care directive, and who holds the originals
- [ ] Deed, car title and the account list for the bank, pension and retirement plans
- [ ] Life insurance policies: insurer, policy number, beneficiary, phone number
- [ ] Medicare, supplemental and prescription card numbers
- [ ] A list of monthly bills and how each one is paid

2. People to tell

- [ ] The person who will arrange the funeral
- [ ] The beneficiary named on each policy
- [ ] A doctor or care provider
- [ ] A faith leader, if you wish
- [ ] An attorney or accountant, if you have one

General education, not insurance, legal or tax advice. Figures are examples unless a source is named. Prices and rules vary by state and insurer.

- [ ] Neighbors or friends who can help the family at first

Funeral arrangements contact

Phone

Insurance agent or company

Phone

3. Wishes to write down

- [ ] Burial or cremation
- [ ] A funeral home you prefer, or one that holds a prepaid plan
- [ ] Cemetery plot or niche already owned, with the location
- [ ] Service type, music, readings or a favorite place
- [ ] An obituary, photo or details you want shared
- [ ] Charities for donations in your name

Preferred funeral home

Burial or cremation

Plot or niche location

4. Money and policies

- [ ] Final expense or life insurance: face amount and waiting period
- [ ] Prepaid funeral contract: funeral home and amount paid
- [ ] Savings set aside for final costs
- [ ] Debts that will need to be paid, and who to call about each
- [ ] Social Security payments to report or stop

> The funeral home does not have to be the only place that holds your wishes. Give a copy to your beneficiary and keep the original with your papers.

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5. Yearly review

- [ ] Beneficiaries are still right
- [ ] Premium due dates are on the calendar or on an automatic draft
- [ ] Phone numbers and addresses are current
- [ ] Funeral wishes still match what you want

Date reviewed

Reviewed with

Sources

- FTC: Shopping for funeral services
  consumer.ftc.gov/articles/shopping-funeral-services
- SSA: Survivors benefits
  www.ssa.gov/benefits/survivors/

Want to see what a policy for your funeral might cost? Try the free estimate at finalexpense60.com/quote

finalexpense60.com/quote or call (888) 635-3511

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