



## Arrangement Meeting Preparations

On behalf of our entire staff, we offer your family sympathy and support during this difficult time.

We're here for you and want to make these arrangements as easy on you as possible. During the next few days, we will be here with you to guide and assist you in honoring your loved one. We hope that we earn your trust in the days ahead and that you know you can count on us to be here for you and your family long after our services are completed.

Our goal is to help you create a meaningful event to honor and celebrate the life of your loved one. You shouldn't feel rushed when you meet with us; we know these decisions are difficult. We will spend as much time with you as you need to feel comfortable that we've created a memorable service that truly honors the life of your loved one.

Please remember that not all decisions need to be made when you arrive. This is the time to review all the options available to you and to understand your loved one's wishes.

## Agenda: What We'll Talk About

We're here to help you honor the life of your loved one, while making the process as easy and simple as possible. During this meeting we will begin by learning as much about your loved one as we can to create a personalized service that beautifully honors your loved one's life. We will also begin gathering required information and handling necessary paperwork and details for you. Some of the items we will review may include:

- Preparing and filing the death certificate
- Scheduling the service
- Selecting funeral and/or cemetery merchandise
- Preparing an obituary notice
- Signing any necessary paperwork

# Arrangements Checklist

The following is a list of information and items that will be needed for your funeral director to complete required legal documentation, as well as to help with your loved one's obituary and final arrangements. If you don't have all of this information right now, don't worry. We can get it in the days ahead. This is just a checklist to help you get organized.

## Information about your loved one:

Full legal name \_\_\_\_\_

Location of death \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

## For your loved one:

Clothing *(including undergarments) (if applicable)*

Shoes and socks or hosiery *(if applicable)*

Eyeglasses and jewelry  
*(these items may remain with your loved one or be removed and returned after the service) (if applicable)*

Dentures *(if applicable)*

## To help with arrangements:

A recent photograph

A collection of valued photographs (20-40) for memorialization through printed materials and video tributes

U.S. Armed Forces serial number and veteran's discharge papers *(if applicable)*

List of 6-8 pallbearers *(if applicable)* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Cemetery arrangement information *(if applicable)* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## To gather for obituary/notices:

Place of birth (*city, state/province*) \_\_\_\_\_

Education/work history (*resume or professional bio if applicable*) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mother's full name (*including maiden name*) \_\_\_\_\_

Father's full name \_\_\_\_\_

Name of place of worship or religious affiliation \_\_\_\_\_

\_\_\_\_\_

Place and date of marriage (*if applicable*) \_\_\_\_\_

Organizations or memberships \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Special achievements \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List of those who recently predeceased your loved one \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name(s) of surviving relatives and the cities in which they live

(*include daughters, sons, brothers, sisters, and number of grandchildren and great grandchildren*)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_