

Grace Lutheran Church

Funeral Planning Form

115 East King Street, Boone, NC 28607 • 828-264-2206
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Please complete all sections as fully as possible. This form is considered confidential. Attach any additional information desired. Give a copy of this form to your Pastor and to your family members who would most likely be responsible for making arrangements on your behalf.

IN MEMORIAM OR OBITUARY

Full name (include maiden name if applicable):

Date of birth: _____ Place of birth: _____

Date of death: _____ Place of death: _____

Father's name: _____

Mother's maiden name: _____

Baptismal date and place: _____

Confirmation date and place: _____

Spouse's name: _____

Marriage date and place: _____

Living Relatives (name, relationship, city/state. If more space needed, attach separate sheet):

Other information for the obituary (education, occupation, military service, church and club activities)

Out of Town Newspaper to Notify: _____

Optional, but helpful information for your family when making arrangements:

Preferred Funeral Home _____

For burial or entombment in a mausoleum disposition of body:

Cemetery Name: _____ Location: _____

Section: _____ Lot: _____

Deed located at: _____

Lot registered in name of: _____

For cremation disposition of body (circle one): Direct After viewing

I have donated my body to: _____

A copy of Instrument of Donation is located at: _____

The signed copy of my will is located at: _____

Signed: _____ Date: _____

IMPORTANT DOCUMENTS TO COLLECT

This is a checklist of key documents you may need to gather. It is helpful to inform your Power of Attorney or executor and/or family about the location(s) of these records.

- Living Will (Advance Directive for a Natural Death)
- Healthcare Power of Attorney
- Will and/or Trust
- Life Insurance policies
- Financial documents such as stock certificates, saving bonds
- Birth certificate
- Marriage certificate
- Titles to vehicles
- Mortgage records
- Deed to house/land
- Military discharge papers
- Earning records for the last year
- Copies of last 3 years of tax returns
- Retirement plan information

OTHER KEY INFORMATION TO COLLECT:

- Life insurance policies
- Financial documents (stock & Investment papers, bank account numbers)
- Birth & marriage certificates
- Titles to vehicles
- Mortgage records or deed for house & land
- Business records
- Military discharge papers
- Earning statements for the last year.
- Copies of last three years income tax returns filed.
- Retirement plan information

NOTES:

TASKS TO BE DONE SHORTLY AFTER A LOVED ONE PASSES

- Contact family, pastor and/or close friends
- Gather information about funeral plans
- Contact Funeral home; make arrangements with cemetery, or Memorial Garden
- Complete organ & body donation arrangements
- Notify others about the death
- Plan funeral/memorial service with pastor
- Thank friends and family

ADMINISTRATIVE TASKS IN THE FOLLOWING WEEKS

- Find Will, Trust, Estate, and/or financial records
- Order multiple copies of death certificate: Funeral Director can assist
- Call attorney to decide if needed to help settle the estate
- Contact trustee(s) if trust fund was involved
- Contact bank and/or broker to check on accounts
- Contact & meet with life insurance agent to file insurance claim
- File for other benefits as appropriate
- Check the safe deposit box
- Cancel credit cards

SETTLING THE ESTATE IN THE FOLLOWING MONTHS

- Determine if probate is necessary
- Hire an attorney, if needed or you do not already have one
- Organize estate information for the attorney
- Read the will
- Contact probate, if necessary
- Contact the Clerk of Court
- Take steps as instructed for probate or by the Clerk of Court
- Meet with accountant, tax advisor, or financial advisor
- Evaluate and update your will and re-title assets
- Determine what to do with the residence

NOTES :

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