



Final Expense Insurance

A Pre-Planning Guide

Family History

First name	middle	last	
Street address	city	state	zip
Birthplace: city	state	birthdate: month/day/year	
Resided in county	state		
Lived here since			
Marital status	spouse name (include maiden name)		
Marriage: date	place		
Father's name and birthplace			
Mother's maiden name and birthplace			
Child's name	birthplace		
Child's name	birthplace		
Child's name	birthplace		
Child's name	birthplace		
Occupation	employing company		
Type of business/industry	since (year)		
Social security number			
Veteran/branch of service	serial no.		
Name of war or dates served			
organization	rank		
enlisted at	date		
discharged at	date		
location of discharge certificate			

Persons to Notify

Immediate family member to contact/relationship

Address city state zip

Telephone (including area code) email

Immediate family member to contact/relationship

Address city state zip

Telephone (including area code) email

Friends who will assist the family:

Name telephone email

Name telephone email

Name telephone email

Preference for immediate contact:

Funeral arrangements counselor telephone email

Address city state zip

Attorney telephone email

Address city state zip

Accountant telephone email

Address city state zip

Family doctor telephone email

Address city state zip

Documents

You will find my Last Will and Testament at:

You will find my birth certificate in: _____

My attorney is: _____

Location of safety deposit boxes and bankbooks for: _____

company

policy number

Life insurance: _____

Hospital and medical insurance: _____

Automobile insurance: _____

Disability insurance: _____

Others (unions or lodges): _____

I have bank deposits at the following banks: _____

I have appointed: _____

to be executor(trix) of my estate.

Personal Memorial Instructions

Place of service/memorial chapel _____ telephone _____

Religious denomination _____ place of worship _____ city _____ state _____

Please contact: Minister Priest Rabbi

Name _____ telephone _____ email _____

Address _____ city _____ state _____ zip _____

Participating organizations (military or fraternal) _____

Type of service: open closed

Casket: metal/wood/fiberglass _____ interior color _____ exterior color _____

Flag: yes no _____ fold/place at head of casket/drape casket _____

Music:

Organist: yes no

Selections: _____

Soloist: yes no

Selections: _____

Favorite passage from the Bible or other literature:

Clothing:

Use from current wardrobe: yes no

Jewelry: _____

Stays on or return jewelry to: _____

Wedding ring: _____

Stays on or return ring to: _____

Personal Memorial Instructions

Cemetery decisions:

Location of ownership certificate/deed for cemetery property

Name of cemetery

Address

city

state

zip

Exchange privileges:

yes

no

Prefer: mausoleum entombment

lawn

crypts

Spaces

Actual description of cemetery property to be used

Crypt or space

tier or lot

mausoleum or lawn

Vault

flower container

Memorial

bronze / granite / other

Inscription

emblem

Flowers

color and type preferred

Donations (instead of flowers) to:

Special instructions:

These are my instructions and memorial wishes.

Signed _____

date _____

Witness _____

date _____

Funeral Director and Professional Services

It is my desire that my policy be used to provide the following funeral service and merchandise:

Funeral director designation: _____

Type of casket: _____

Outside vault or container: _____

Type of clothing: _____

Additional professional services:

Professional services

First call from place of death

Embalming and proper care of body

Dressing

Cosmetology and hairdressing

Restorative artwork when necessary

Use of mortuary & facilities

Funeral coach

Limousine for family use

Car for pallbearers

Reposing room

Handling of floral offerings

General assistance

Preparation of necessary papers

Obtaining burial permit

Notifying newspapers

Furnishing acknowledgement cards

Preparing social security forms

Preparing insurance forms

Preparing veterans forms

Arranging for grave space

Arranging for opening and closing grave

Obituary

Newspapers need information for news articles. I have filled in the information below.

Name _____

Born at _____

Date _____

Education _____

Married _____ date _____

Place _____

Religious denomination _____

Clubs or lodges _____

Military record _____

Information about employment _____

Other information _____

Surviving relatives (list names and relationships)

A Checklist of Things To Do for Family and Friends

1. Notify:

- The doctor or coroner
- The funeral director
- The cemetery or memorial park
- The clergy and place of worship
- All relatives
- All friends
- Organist and soloist
- Pallbearers
- Insurance agents
- Unions and fraternal organizations
- Newspapers

2. Select:

(see Personal Memorial Instructions on pages 6-7)

- Memorial estate and plot, if not already done
- Casket
- Vault or outer case
- Clothing
- Blanket or robe
- Flowers
- Music
- Food
- Furniture
- Time and place
- Transportation
- Thank you cards

3. Additional obligations include:

- Providing vital statistics about deceased to the newspaper and person planning the service
- Preparing and signing necessary papers
- Providing addresses for all interested people who must be notified
- Answering phone calls, messages and letters
- Greeting friends and relatives who call
- Providing lodging for out-of-town guests
- Cleaning the home
- Planning funeral car list

4. Arrange payment for:

- Doctor
- Nurse
- Hospital
- Medicine
- Funeral
- Cemetery plot
- Interment service
- Clergy
- Organist
- Florist
- Clothing
- Transportation
- Telephone
- Food
- Memorials

Your Funeral Director

How the Funeral Director can help:

The Funeral Director should be consulted immediately at time of death. This professional is licensed by the state. In order to obtain that state license, the Funeral Director has to meet the educational requirements of the State Board, resulting in the professional training and experience that will be needed in order to carry out the service outlined in this guide.

Consult the Funeral Director as to the time and place of service. Funeral Directors can assist in having the grave opened, obtaining singers, and contacting places of worship and clergy. They will arrange for newspaper notices to be published and can help in procuring certified copies of the death certificate. They also are qualified to advise about Veterans Burial Allowance and Social Security Death Benefits.

If shipment is to be made to another locality for burial, they will arrange for shipment by funeral coach, rail or air and can advise as to the most economical and best means of shipment.

They will be able to aid in the selection of a casket and can help in providing clothing if needed.

All legal work in filing of the death certificate with the Vital Statistics Bureau and in obtaining a Burial Permit will be taken care of by the Funeral Director.

This guide is furnished by:

Agent's name: _____

Address: _____

Phone number: _____

Email: _____



**Have questions about Final Expense Insurance?
Talk to one of our specialists today.**

**Call (844) 437-4253
or visit us online at GetSBI.com**