

Pre-Planning Checklist

A complete worksheet for documenting your funeral wishes. 20–30 minutes.

Why pre-plan

Documenting your wishes now spares your family from making major decisions under pressure. This checklist covers everything most families are asked at the arrangement table. Fill it in at your pace, give a copy to the person you designate, and keep the original with your important papers. It costs nothing and locks in nothing — you are free to change it anytime.

1 • Your information

- ☐ Full legal name (including maiden name if applicable)
- ☐ Date of birth and Social Security number
- ☐ Current home address
- ☐ Place of birth (city, state, country)
- ☐ Father's full name (including maiden name if applicable)
- ☐ Mother's full maiden name
- ☐ Highest level of education completed and institution name
- ☐ Occupation and employer (or retired from)
- ☐ Military service: branch, rank, dates, honorable discharge (if applicable)
- ☐ Religious affiliation or preference (or 'none' / 'secular')

2 • Disposition preference

- ☐ Cremation · direct (no service)
- ☐ Cremation · with a memorial service
- ☐ Traditional funeral with burial
- ☐ Green/natural burial (no embalming, no vault)
- ☐ Anatomical donation to a Texas medical school
- ☐ Other (describe): _____

3 • Service style

- ☐ Private service · immediate family only
- ☐ Public service · open to friends and extended community
- ☐ Religious ceremony at a place of worship
- ☐ Secular memorial at the funeral home, home, or other venue
- ☐ Graveside-only service
- ☐ No service at all — remembered informally by family

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- ☐ Viewing / visitation desired before the service
- ☐ Open casket · closed casket · no preference

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4 • Details you'd like included

- ☐ Music you want played: _____
- ☐ Readings, scripture, or poems: _____
- ☐ Officiant preference (name and contact): _____
- ☐ Specific funeral home preference: _____
- ☐ Cemetery or final disposition location: _____
- ☐ Casket, urn, or container preference: _____
- ☐ Flowers: yes · no · donations to _____
- ☐ Obituary newspaper placement: yes · no · online only

5 • People to contact

- ☐ Primary contact (relationship, phone, email): _____
- ☐ Secondary contact: _____
- ☐ Attorney / executor (name, phone): _____
- ☐ Financial advisor (name, phone): _____
- ☐ Clergy / spiritual advisor: _____
- ☐ Employer HR contact (if employed): _____

6 • Important documents — tell your contacts where these are

- ☐ Will and/or living trust
- ☐ Power of attorney (financial and medical)
- ☐ Birth certificate
- ☐ Marriage / divorce documents
- ☐ Military discharge (DD-214)
- ☐ Life insurance policies (company names and policy numbers)
- ☐ Social Security card
- ☐ This completed checklist

7 • A final note to your family (optional)

Use this space for anything you'd like your family to read after you're gone — a reflection, a favorite passage, a last sentiment. Families often describe these notes as the single most meaningful page in the whole document.

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Next steps

When this is filled in: (1) make two copies, (2) give one to your primary contact and keep the original with your will, (3) let us know if you'd like a free pre-planning conversation — call (214) 738-4276 or email care@vargascabrerafuneralhome.com. We can add funding and pricing to lock in today's rates in a Texas-regulated preneed trust, but it is not required.