

# FUNERAL PLANNING CHECKLIST

*Your Guide to Creating Clarity, Honoring Wishes, and Supporting Loved Ones*

## BEFORE A LOSS (PLAN AHEAD)

*Help your family avoid guesswork and conflict later by preparing these details now:*

- ☐ Identify final wishes (burial, cremation, donation, etc.)
- ☐ Choose funeral home or service provider
- ☐ Pre-pay or set aside funds for funeral expenses
- ☐ Write or outline your obituary
- ☐ Select location(s) for service, burial, or ash scattering
- ☐ Appoint someone to manage arrangements
- ☐ Communicate wishes to family (ideally in writing)
- ☐ Store all documents and instructions in one accessible place

## IMMEDIATELY AFTER DEATH

*If you're handling arrangements after a loss:*

- ☐ Notify close family and key contacts
- ☐ Contact preferred funeral home or mortuary
- ☐ Arrange transportation of remains (if needed)
- ☐ Confirm burial or cremation decisions
- ☐ Begin obituary or death announcement
- ☐ Order 10–15 certified death certificates
- ☐ Locate will or trust to verify burial instructions

## PLANNING THE SERVICE

*Plan a meaningful tribute with less stress and more clarity:*

- ☐ Choose date, location, and type of service (religious, military, celebration of life)
- ☐ Identify speakers, music, readings, or cultural traditions
- ☐ Decide on burial or scattering logistics
- ☐ Coordinate reception or post-service gathering
- ☐ Notify extended family, friends, and community
- ☐ Set up live stream or recording if needed
- ☐ Create a memory board, photo slideshow, or legacy table
- ☐ Assign a point person for logistics on the day of the event

## AFTER THE SERVICE

*Don't forget these follow-ups:*

- ☐ Send thank-you notes for flowers, donations, or support
- ☐ Close or memorialize social media accounts
- ☐ Begin estate-related tasks (see [Executor Support Services](#))
- ☐ Hold a family meeting for closure or next steps