

## Planning Ahead: A Simple Checklist

**Document your wishes**

Write down preferences for burial or cremation, service type, and memorialization.

**Have you protected yourself legally?** Do you have a will? Do you have an executor? Have you communicated this with your family?

**Choose a cemetery and interment option**

Select burial, cremation interment, natural burial, or columbarium, and record the location.

**Discuss your wishes with loved ones**

Ensure family members know your preferences and where documents are kept.

**Select a funeral home**

Contact a funeral professional if that is your wish.

**Gather vital documents**

Organize items such as your will, power of attorney, birth certificate, and insurance policies.

**Record personal information**

Include full legal name, date and place of birth, marital status, and next of kin.

**Make financial arrangements**

Decide how funeral and cemetery expenses will be covered and who will be responsible for reaching out to the financial institution.

**List key contacts**

Identify who should be notified, including executor, family members, lawyer, and financial advisors.

**Plan for dependents and pets**

Document care arrangements if applicable.

**Store everything in one place**

Keep documents and instructions in a clearly marked, accessible location.

*Thoughtful preparation today helps preserve dignity, clarity, and peace of mind for those who will one day carry out your wishes.*