

Advanced-Planning Worksheet

HELPING FAMILIES PREPARE TODAY FOR THEIR NEEDS TOMORROW



IMPORTANT PRE-PLANNING INFORMATION

1. I would prefer: ☐ Burial ☐ Cremation

If burial, my choice of casket is: ☐ Hardwood ☐ Metal ☐ Cremation/Ceremonial ☐ All Wood Construction

If cremation, my choice of urn is: ☐ Wood ☐ Metal ☐ Porcelain ☐ Other
2. Visitation time preference: ☐ 1 Day ☐ Half Day ☐ None ☐ Other
3. Ceremony to be held at: ☐ Church/Chapel ☐ Synagogue/Temple ☐ Graveside ☐ Other
4. I would prefer: ☐ National Cemetery ☐ Private Cemetery ☐ Other
5. I have pre-paid my: ☐ Funeral/Cremation Arrangements ☐ Cemetery Arrangements

PLEASE ANSWER QUESTIONS 6 AND 7 IF YOU ARE A UNITED STATES VETERAN

6. Branch of service: ☐ Army ☐ Marines ☐ Navy ☐ Air Force ☐ Coast Guard ☐ National Guard
7. I can locate my DD-214: ☐ Yes ☐ No
8. I am a member of this veteran service organization.....

I am interested in the following:
Check all that apply...

- ☐ FREE Private In-Home Consultation
- ☐ Group Seminar

.....
Place of Seminar

.....
Date Attended

.....
Comments

.....

CONTACT INFORMATION

.....
Name Phone

.....
Address

.....
City State Zip

.....
Email

The best day of the week to meet is:

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

☐ Morning __:__ ☐ Afternoon __:__ ☐ Evening __:__

Appointment Date: