

# Our experts can offer the guidance you and your loved ones need – so you can focus on what's important

Following the death of a loved one, there are as many as 87 important details that need attention. A relative, friend or even a stranger is left the responsibility of completing these tasks often within 72 hours, unless some of the decisions are made ahead of time.

## Plan now Vital information, documents:

- 1 Take the first step to pre-planning by consulting your representative for information
- 2 Name, address and telephone numbers
- 3 How long at present address
- 4 Date of birth
- 5 Place of birth
- 6 Legal proof of age or birth certificate
- 7 Citizenship, citizenship papers
- 8 Social Insurance Number
- 9 Business name or employer's address/contact
- 10 Occupation and title
- 11 Father's name
- 12 Father's birthplace
- 13 Mother's maiden name
- 14 Mother's birthplace
- 15 Religious name (if applicable)
- 16 Military Service Serial Number (if applicable)
- 17 Military Discharge Certificate (if applicable)
- 18 Legal Will and Power of Attorney
- 19 Pensions
- 20 Insurance policies (life, health, car, property)
- 21 Investments
- 22 Bank books, account numbers
- 23 Deeds to properties (house, cottage)
- 24 Bill of sale of automobile, boat, other
- 25 Income tax returns, receipts, cancelled cheques
- 26 Disability claims
- 27 Cemetery Certificate of Ownership
- 28 Marriage Licence
- 29 Addresses of children, relatives, close friends etc.
- 30 Passwords: computer, accounts, social media

## Plan now Personal choices, final wishes:

- 31 Meet with funeral director, cemetery representative, and/or clergy about details of wishes
- 32 Discuss options with loved ones
- 33 Choose cremation or burial
- 34 Select style of urn or casket
- 35 Which funeral practitioner or crematorium to call
- 36 Place where service is to be held, ie: funeral home, religious institution, other
- 37 Length and location of the visitation
- 38 Reception location (funeral home, church, other)
- 39 Service type (religious, military, casual, themed, etc.)
- 40 Celebrant (funeral director, clergy, other)
- 41 Select pallbearers and other participants
- 42 Choose flowers and/or a commemorative display
- 43 Choose music (spiritual, popular, live or recorded)
- 44 Select readings (religious and/or secular)
- 45 Charitable organizations for in-memoriam donations
- 46 Select catering style (classic, gourmet, themed, custom)
- 47 Select the cemetery/mausoleum
- 48 Cemetery lot or niche or crypt location
- 49 Vault or sectional crypt
- 50 Style of memorial (marker, stone, niche, bench, etc.)
- 51 Decorative elements and inscriptions
- 52 Interment service details, celebrant etc.
- 53 Note the details/people to be included in obituary
- 54 Make notes on what to include in eulogy
- 55 Transportation for deceased
- 56 Transportation for family (coach, procession, limo)
- 57 Determine budget and how expenses will be paid: (Full amount due at the time of crisis, or, in affordable installments available by pre-planning)

## Who to notify when a death occurs:

- 58 Funeral home and cemetery
- 59 Doctors/medical practitioners
- 60 Relatives, friends, colleagues, neighbours
- 61 Employers of deceased

- 62 Insurance agents (life, health & accident)
- 63 Organizations (religious, fraternal, civic, veterans, unions)
- 64 Lawyer, accountant and executor
- 65 Bankers, investors, creditors, government

## Responsibilities at time of death:

- 66 Set time/date of services, visitation, interment
- 67 Inform and instruct pallbearers
- 68 Clothing for the deceased
- 69 Create online memorial (ie: Sharing Memories™)
- 70 Social media announcements
- 71 Write eulogy or provide notes to assist the writer
- 72 Prepare home for receiving visitors
- 73 Check and sign legal papers, burial permits etc.
- 74 Place obituary or provide vital statistics about deceased to newspaper
- 75 Respond to phone calls, messages, cards
- 76 Arrange lodging for out-of-town guests
- 77 Make list of callers and floral tributes for mailing thank you cards
- 78 Arrange for any special religious requirements
- 79 Check Will regarding specific wishes
- 80 Order the Death Certificate
- 81 Arrangements for care of dependents and pets
- 82 Arrange clergy participation, pay clergy fees
- 83 Pay utilities and other current or urgent bills (mortgage or rent, taxes, installment payments)
- 84 Pay any outstanding medical or legal fees
- 85 Pay florist and caterers, unless paid in advance
- 86 Pay funeral fees, unless paid in advance
- 87 Pay cemetery fees, unless paid in advance

## It makes sense to make plans now.

Spare unnecessary stress, guarantee your personal wishes are met, and save money by making purchases at today's prices.

**Questions? Your local professional is available to guide you through the pre-arrangement process.**