

This Pre-Planning form outlines a variety of details that you might wish to assemble to complete your plan. You can fill out the form online, save it, and mail it to us. Or you may first save the form to your computer, and then fill it out, print it, and bring it to a Pre-Planning meeting.

**1. Your Contact Information**

Full Name:

Address:

City:

State:

Zip Code:

Country:

Phone:

Email:

Comment:

Best time to contact  
you?

**2. About the Person You Are Planning for:**

Planning for:

Marital Status:

Full Name:

Address:

City:

state:

Zip code:

Country:

Phone:

Email:

Date of Birth:

Place of Birth:

SNN:

**3. Important Names in The Person's Life:**

Spouse's Name (include Maiden Name):

Parents' Names (Mother's Maiden Name):

Children & Spouses, Names & Locations:

Names of Loved Ones Who Predeceased:

**4. Educational History - School, Training:**

Last Grade Attended or Year Graduated:

Other Training, Degrees, Year Attained:

Highest Education, Other Comments:

**5. Military History - Service Details:**

Branch of Service, Highest Rank Attained:

Tours, Locations, Duties:

Date Enlisted and Discharge:

Comments, Other Details, Military Honors Requested:

**6. Work History - Career Details:**

Occupation, Business or Industry:

Company, Employer, Years of Service:

Previous Employment, Comments, Other Details:

**7. Location History - Travel Details:**

Childhood City/State(s):

Other Places Lived - Years:

Comments, Favorite Travel Details:

**8. Hobbies & Other Personal Interests:**

Favorite Pastimes:

Memberships/Active In:

Comment on what the person liked to do:

**9. Person to Finalize Arrangements Upon Death**

Full Name:

Address:

City:

State:

Zip Code:

Country:

Phone:

**10. Instructions on Final Disposition**

Cemetery:

Address:

City:

State:

Zip Code:

County:

Phone:

Email:

E-mail:

Comment:

Arrangement:

### **11. Service Location(s) and Officials**

Clergy/Officiator:

Place of Worship:

Religion:

Service Location:

### **12. Memorial Instructions and Wishes:**

Special Instructions:

- Pallbearer Names,
- Clothing/Jewelry to be worn,
- Items for a Memento Display,
- Musical Selections (Played, Sung, Other),
- Favorite Literature or Poems,
- Favorite Passages of Scripture,
- Favorite Flowers/Color,
- Other Arrangements.