

Planning Checklist

- **Vital statistics (including)**
 - Name of father, place of birth, year
 - Mother's maiden name, place of birth, year
 - Education – elementary, high school, college, graduate school
- **Social Security number**
- **Veteran information**
 - Military service
 - Branch rank
 - Date of enlistment
 - Date of discharge
 - Name(s) of war/conflict(s) toured
 - Serial number
- **Affiliations**
 - Fraternal, service, and union memberships
 - Special recognitions
- **Persons to contact**
 - Children, relatives and friends to notify
- **Funeral preferences**
 - Preferred clergy/celebrant
 - Names of pallbearers and honorary pallbearers
 - Preferred music, Bible verses, or poetry
 - Preferred clothing or jewelry
 - Burial property information
 - Special instructions
- **Location of important documents and passwords**