

Preparing for the Future: Personal Information and Funeral Planning Guide

Your Name	
Date	



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Table of Contents

I.	Instructions.....	4
II.	Personal Information.....	5
	A. Information for Death Certificate.....	5
	B. Military Service.....	5
	C. Other Personal Identification Numbers	6
	D. Children	6
	E. Education.....	6
	F. Employers (Current and Former)	7
	G. Volunteer Organizations.....	7
III.	Financial, Property, and Insurance Information for Estate Settlement	8
	A. Key Financial Advisors and Executor	8
	B. Location of Important Documents or Items.....	9
	C. Banking and Investment Information.....	10
	D. Property and Loan Information.....	10
	E. Credit Card, Utility, Subscription, and Membership Information	11
	F. Key Medical Providers	12
	G. Insurance Information	13
	H. Notes for Additional Information or Instructions.....	14
	I. Estate Settlement Checklist.....	15
IV.	Funeral Planning Information.....	16
	A. Preplanning and Prepaying.....	16
	B. Funeral Laws and Your Rights.....	16
	C. Cremation	17
	D. Cemeteries.....	17
	E. Death Certificate.....	17
	F. Funeral Costs and Cost Comparison Worksheet	17
	G. Local Funeral Home Contacts	19
V.	Designate Your Funeral Preferences	20
	A. Funeral Payment and Funeral Planner(s)	20
	B. Notifications and Obituary	20
	C. Burial Process and Headstone/Marker	22
	D. Funeral Type and Visitation.....	23
	E. Funeral Presider and Pallbearers.....	24
	F. Special Services (Military, Other)	25
	G. Flowers and Adornments	25

H. Music and Readings..... 25

VI. Church of St. Benedict’s Funeral Planning Form 27

I. Instructions

After a loved one's death, grieving family members are typically faced with numerous funeral planning decisions that often must be made quickly under stressful circumstances. For instance: Where should the funeral be held? What information should be included in the obituary? Who should be notified? After your funeral, key information and legal documents are needed to settle your estate. Your survivors will need to know where your important legal documents are located, what insurance you have, where your financial accounts are held, etc.

You can support your loved ones through this emotional process and help them make decisions based on *your* preferences by documenting key personal, financial, insurance, and funeral planning information today in this easy-to-use guide created by the Church of St. Benedict's leadership.

This confidential guide can be completed electronically and printed or it can be printed and filled out by hand. Store the completed document in a safe place in your home. Be sure to let your family members and executor know where it is located. Do not put your only copy of this document in a safe deposit box because it may not be immediately accessible following your death.

Note: The information that you enter into the guide is private. It is not intended to be shared with the church. This guide simply provides a way for you to document important information for your family and executor. The only information that the church will eventually need is found in Section VI. This section illustrates an example of the form that the Church of St. Benedict uses to coordinate a funeral service and burial.

The remainder of this easy-to-use guide is organized in the following sections:

II. Personal Information: This section helps you record your personal information that will be needed to complete your death certificate and request other financial or legal documents.

III. Financial and Insurance Information: This section helps you record the names of your key advisors, indicate the location of your important documents (e.g., birth certificate and insurance policies), and list important financial accounts, assets, and insurance policies.

IV. Funeral Planning Information: This section provides information about funerals, the Funeral Law, local funeral home contact information, and a cost comparison worksheet.

V. Designate Your Funeral Preferences: This section helps you select your funeral preferences. This information will make it easier for your loved ones to carry out your final wishes.

VI. Church of St. Benedict Funeral Planning Form: This section contains an example of the form that the Church of St. Benedict uses to coordinate a funeral service and burial. It is for illustration purposes only. At the time of your death, your family can work with church staff to easily complete this form based on the preferences you identified in Section V. For questions regarding funeral liturgy planning and cemetery plots, call 320-250-5618 or visit the church's web site at <http://stbenedictavon.net>.

***Disclaimer:** This document is a guide—not a legal document. It is designed to help you collect important information, designate your funeral preferences, and give your loved ones the information they need to carry out your wishes. Consult an attorney or financial advisor for estate planning advice.*

II. Personal Information

A. Information for Death Certificate

Fill in your personal information below. This information is typically required to complete the death certificate which will be used to file life insurance claims and transfer titles for homes, automobiles, and financial accounts.

Full Legal Name (First/Middle/Last)	
Other Name(s) You Are Also Known As	
Social Security Number	
Sex	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of Birth (Month/Day/Year)	
Birthplace (City/State)	
Current Address (Street/City/State/ZIP)	
Race	
Your Maiden Name (First/Middle/Last)	
Mother's Maiden Name (Prior to First Marriage) (First/Middle/Last)	
Father's Name (First/Middle/Last)	
Marital Status	<input type="checkbox"/> Married <input type="checkbox"/> Married, but separated <input type="checkbox"/> Widowed <input type="checkbox"/> Divorced <input type="checkbox"/> Never Married
Spouse's Name (First/Middle/Last)	
Spouse's Social Security Number	
Date of Marriage	
Place Marriage Recorded	City/State: County:

B. Military Service

Were you ever in the Armed Forces? Yes No

If yes, indicate the branch, your rank, serial number, discharge date, and contact information below.

Military Branch	Rank	Serial Number	Discharge Date	Contact

C. Other Personal Identification Numbers

Other Identification	Number	State or Country of Issuance
Driver's License (Number changes every 4 years in MN.)		
State Identification (In lieu of Driver's License)		
Passport		
Visa		
Green Card		

D. Children

Do you have children? Yes No

If yes, fill in the full name, date of birth, and birthplace for each child.

Child's Name (First/Middle/Last)	Date of Birth (Month/Day/Year)	Birthplace (City/State)

E. Education

School Attended	City/State	Degree Earned or Highest Grade Completed	Year

F. Employers (Current and Former)

Employer Name	Address City/State/Zip	Phone Number	Employee ID# and Hire Date	Employer Status
			ID # : Date:	<input type="checkbox"/> Current <input type="checkbox"/> Former
			ID # : Date:	<input type="checkbox"/> Current <input type="checkbox"/> Former
			ID # : Date:	<input type="checkbox"/> Current <input type="checkbox"/> Former
Notes:				

G. Volunteer Organizations

List the volunteer organization(s) that you participate in and your role(s).

Organization Name	Address City/State	Contact Name and Phone Number	Your Role

III. Financial, Property, and Insurance Information for Estate Settlement

Settling the estate of a loved one can be confusing and time consuming. You can simplify this task for your loved ones by completing a will, naming an executor, and documenting your financial accounts, property, and insurance information.

A **will** is a legal document that indicates who will inherit your assets and how those assets will be distributed after you die. A will also names the guardian(s) for your minor children and specifies an **executor**—the person you want to administer the settlement of your estate. Generally, an executor collects and values assets, settles debts, pays taxes, and distributes the remaining assets to the heirs in accordance with your will. Today, many people create simple wills using software or preprinted forms. Others choose to seek legal services from an attorney.

If no will exists, state law defines who is eligible to fill the executor’s role—typically the surviving spouse or an adult child. If a probate court proceeding is necessary, the Court will appoint an administrator and the estate is distributed in accordance with the state’s intestate rules.

It is important to note that various assets (e.g., life insurance, bank accounts, and retirement accounts) are not distributed through a will. These assets are distributed to the beneficiaries identified in the policy/account documents.

Your executor or family members will need access to a number of legal documents and various financial, insurance, and property information to settle your estate. The following section helps you document this important information.

A. Key Financial Advisors and Executor

List your key advisors below. If you do not have a specific advisor, enter “none” in the corresponding contact name section.

Advisor	Contact Name	Company Name	Phone Number
Accountant			
Attorney			
Executor(s)			
Financial Planner			
Other			

B. Location of Important Documents or Items

To make it easier for your executor or family members to find important documents or items, use the chart below to identify their location(s). If an item is not applicable, enter N/A in the corresponding location section.

Document	Location & Notes
Advanced Health Care Directive/Living Will	
Birth Certificate	
Diplomas	
Divorce or Annulment Decree	
Insurance Policies and ID Cards	
Marriage Certificate	
Military Records	
Passport	
Power of Attorney	
Prepaid Funeral Plan	
Property Deeds	
Safe	
Safe Deposit Box Key	
Social Security Card	
Trust Documents	
Vehicle Titles	
Will	
Other Documents	

C. Banking and Investment Information

To settle the estate and pay any final expenses, your executor or family will need access to your financial accounts. List your banking and retirement accounts below. If an account type is not applicable, enter N/A in the corresponding account number section.

Account Type	Account Number	Financial Institution/ Location	Contact Info & Notes
Checking Account(s)			
Savings Account(s)			
401k			
Brokerage Account			
Certificate of Deposit			
IRA			
Money Market Account			
Pension			
Safe Deposit Box			
Stocks Specify:			
Other Account Specify:			

D. Property and Loan Information

Your executor or family members will also need details regarding your property and any loans outstanding against the property. If an item is not applicable, enter N/A in the description section.

Property Type	Description/Location	Do you have a loan for this asset?	Loan Details
Home (primary)		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Home (secondary)		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No

Property Type	Description/Location	Do you have a loan for this asset?	Loan Details
Auto		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Auto		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Boat		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
RV		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Motorcycle		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Jewelry		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Property:		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Property:		<input type="checkbox"/> Yes <input type="checkbox"/> No; Paid in Full	Loan #: Lender Name: Phone #: Is loan on auto-pay? <input type="checkbox"/> Yes <input type="checkbox"/> No

E. Credit Card, Utility, Subscription, and Membership Information

Your executor or family members will need to cancel your credit cards, pay any outstanding bills, and cancel subscriptions and memberships to settle your estate. Record your credit card, utility, subscription, and membership information below.

Credit Cards				
Credit Card Company	Card Number	Expiration Date	Is the bill on auto-pay?	Phone Number or Web Site
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	
			<input type="checkbox"/> Yes <input type="checkbox"/> No	

Utilities				
Utility Company	Service Type	Is the bill on auto-pay?	Notes	Phone Number or Web Site
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		

Subscriptions/Memberships				
Company	Subscription/ Membership	Is the bill on auto-pay?	Notes	Phone Number or Web Site
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		
		<input type="checkbox"/> Yes <input type="checkbox"/> No		

F. Key Medical Providers

Indicate the names of your key medical providers (e.g., doctors, dentist, etc.) in the chart below.

Type	Name	Company Name	Phone Number
Doctor (Primary)			
Doctor (Specialist):			
Doctor (Specialist):			
Doctor (Specialist):			
Dentist			
Other:			

G. Insurance Information

Your executor or family members will need insurance policy information to file claims to settle your estate. Record your life, health, disability, and property insurance information below. If a specific type of insurance is not applicable to you, enter N/A in the corresponding insurance company name section.

Insurance Type	Insurance Company & Contact Information	Policy Number / Group ID Number	Payment Method & Notes
Auto Insurance			
Accidental Death/ Dismemberment Insurance			
Disability Insurance			
Dental Insurance			
Home Owner's Insurance			
Life Insurance			
Medicare Insurance			
Medicare Supplement Insurance			
Other Medical Insurance			
Other Insurance			

H. Notes for Additional Information or Instructions

This page can be used to record additional information such as passwords, other special instructions, identify a Facebook administrator, etc.

I. Estate Settlement Checklist

The checklist below contains a list of common tasks the executor completes to settle your estate. For more detailed information, your executor should consult an attorney for legal advice and an accountant for accounting and tax advice.

	Task
<input type="checkbox"/>	Find the Will: Locate the most recent copy of the deceased's will.
<input type="checkbox"/>	Order Copies of Death Certificate: The funeral home provides some, but additional ones may be needed.
<input type="checkbox"/>	Find Policies/Account Documents: Locate the insurance policies and financial account documents held by the deceased. Identify the beneficiaries and distribution requirements.
<input type="checkbox"/>	Open/Itemize Safe Deposit Box: Open the deceased's safe deposit box in the presence of at least one witness and itemize the contents.
<input type="checkbox"/>	Meet Heirs/Beneficiaries: Meet with the deceased's heirs and beneficiaries. Keep them informed of your progress.
<input type="checkbox"/>	Notify Employer(s): Notify the deceased's employer(s) of his/her death.
<input type="checkbox"/>	Inventory/Valuation: Create an itemized inventory of the deceased's assets and liabilities as well as their value.
<input type="checkbox"/>	Notify Pension, IRA, 401k, and 403(b) Administrators: Notify the deceased's retirement account administrators (e.g., Pension, IRA, 401k, 403b) and identify the beneficiaries. Follow the required process to distribute each plan's assets.
<input type="checkbox"/>	Notify Financial Institutions: Notify financial institutions where the deceased held accounts. Identify each account's beneficiaries and follow the required distribution process/options.
<input type="checkbox"/>	Notify the Social Security Administration: Contact the Social Security Administration at 1-800-772-1213 to determine any benefits the deceased was receiving and identify survivors' eligibility requirements and potential benefits.
<input type="checkbox"/>	Notify Military: If the deceased served in the military, notify the Department of Veterans Affairs at 1-800-827-1000. A burial allowance may be available and minor children may be eligible for benefits.
<input type="checkbox"/>	Set Up Estate Checking Account: Set up an estate checking account to deposit proceeds from the sale of the deceased's assets and pay the outstanding bills (e.g., mortgage, utilities, insurance premiums, etc.). Do not distribute assets to heirs until all bills, outstanding debts, and claims against the estate have been satisfied.
<input type="checkbox"/>	Notify Creditors/Pay Bills: Identify the deceased's creditors and pay any outstanding bills, debts, or other claims against the estate.
<input type="checkbox"/>	Notify Union: If the deceased belonged to a union, notify the union and determine if any benefits are available to the surviving spouse or dependent children.
<input type="checkbox"/>	Cancel Memberships/Subscriptions: Cancel any memberships or subscriptions held by the deceased.
<input type="checkbox"/>	File Medical Insurance Claims: File insurance claims for any outstanding medical bills.
<input type="checkbox"/>	File Life Insurance Claim(s): Notify the deceased's life insurance company(s) of his/her death and file a claim.
<input type="checkbox"/>	Get Accounting Help: Consult an accountant to help you contact the Social Security Administration, obtain guidance on estate accounting, and file taxes.
<input type="checkbox"/>	Get Legal Help: Consult an attorney regarding titling and asset transfer/distribution to heirs and beneficiaries.
<input type="checkbox"/>	Process/File Taxes: Determine when the deceased's taxes are due. Process and file the required tax return.
<input type="checkbox"/>	Distribute Assets to Heirs/Beneficiaries: Distribute the estate's remaining assets (after all debts/obligations have been satisfied) to the heirs and beneficiaries.

IV. Funeral Planning Information

A. Preplanning and Prepaying

Help your family members carry out your final wishes by **preplanning** your funeral—designate your funeral preferences in section V. of this guide.

In addition to preplanning your funeral arrangements, you may want to set aside funds to pay for your funeral. This can be accomplished in a number of ways. You can set aside money in an investment/bank account or purchase an insurance policy to cover your estimated funeral costs. Then, make sure these funds are easily accessible to your loved ones to pay your actual funeral expenses.

Another approach is to **prepay**—all or a portion—of your funeral costs by contracting with a funeral home for funeral goods and services. The risk with this approach is that laws vary from state to state regarding the regulation of the prepayment of funeral services and the extent of consumer protection provided. For example, some states require a percentage of the prepayment to be placed in a state-regulated trust or require the purchase of a life insurance policy with the death benefits assigned to the funeral home.

If you choose to prepay funeral goods and services:

- Carefully read the funeral home contract to understand exactly what is included in the package (e.g., casket, embalming, staff time, memorials, etc.) because prices vary widely—especially regarding the casket.
- Find out how the money that you have prepaid will be safeguarded and what happens to the interest income that is earned on these funds.
- Ask questions about your ability to make changes or cancel the plan in the future.
- Understand your legal rights and the laws governing prepayment of funeral goods and services.

B. Funeral Laws and Your Rights

The Federal Trade Commission (FTC) enforces a federal law—the **Funeral Rule**, 16 CFR Part 453—designed to protect consumers by requiring funeral directors to provide accurate, written itemized pricing and disclosures relating to their funeral goods and services. While many funeral homes offer a variety of funeral packages, you have the legal right to purchase individual goods and services rather than a predefined package.

You have the legal right to purchase a casket online or from another third party. If you plan to have a viewing, the funeral home may require **embalming**. However, embalming is generally not necessary or legally required if burial or cremation occurs shortly after death without a viewing—as is the case with **direct cremation or direct burial** (i.e., body is cremated or buried shortly after death without embalming or viewing). Eliminating embalming can save hundreds of dollars. **Check your state and local laws for current funeral requirements.**

The only fee that a consumer cannot decline is the funeral home's **basic service fee**. This fee includes services common to all funerals such as: funeral planning, obtaining copies of the death certificate and required permits, preparation of notices, holding the remains, and coordinating arrangements with the cemetery or other third parties.

For more information about the Funeral Law or funeral services, contracts, etc., visit the [Federal Trade Commission's web site](#) at: <http://www.consumer.ftc.gov/articles/0300-ftc-funeral-rule> or to lodge a complaint against a funeral provider call the FTC at 1-877-382-4357.

For additional general information about funerals or guidance to resolve problems, visit the Funeral Consumers' Alliance web site at: <http://www.funerals.org/>.

C. Cremation

If you choose to be cremated but also prefer to hold a viewing, your loved ones may opt to rent a casket rather than purchase one from the funeral home. If you opt for **direct cremation** (i.e., no embalming or viewing/visitation), the funeral home must offer an inexpensive, unfinished wood box or non-metal, alternative container (e.g., cardboard, pressboard, or canvas) to be cremated with the body. Cremated remains can be buried in a cemetery, interred in a mausoleum/niche, or scattered in a special location (if current laws allow). Check federal, state, and local laws to determine if it is legal to scatter remains in your chosen location. Note: Catholic teaching permits cremation, but prohibits scattering of ashes.

D. Cemeteries

When choosing a cemetery, consider the location, the cost of the plot, maintenance fees, and the rules regarding markers, flowers, or other remembrances. Most cemeteries also require the purchase of a grave liner to prevent the grave from sinking in the future.

Veterans are eligible to be buried at a national cemetery at no cost to the family. This includes opening/closing the grave, a marker/headstone, and flag. Burial benefits may also be available for the veteran's spouse or dependents. Contact the Department of Veterans Affairs at 1-800-827-1000 for more information.

E. Death Certificate

The death certificate is a legal document issued by a government entity in the jurisdiction where the death occurred. The death certificate includes personal identification information about the deceased person (e.g., name, social security number, date of birth, marital status, parents' names, date and cause of death, etc.).

Your executor will need certified copies of the death certificate to initiate the probate process, file life insurance claims, transfer property titles, close bank accounts, etc. **Generally, the funeral home will provide a number of certified copies of the death certificate as part of their basic service fee. However, more copies may be needed based on the complexity of the estate.** (To calculate the number of copies needed, the executor should consider the number of financial accounts, insurance policies, titled property, etc., owned by the deceased.)

F. Funeral Costs and Cost Comparison Worksheet

The cost of a funeral varies widely based on the funeral provider, type of funeral preferred, and the goods and services selected. A **traditional/full service funeral** (i.e., viewing, visitation, formal funeral service, and burial) is typically the most expensive. **Direct cremation** (i.e., cremation without embalming or visitation) is the least expensive option followed by **direct burial** (i.e., burial without embalming or visitation). Each funeral home will charge a non-declinable, **basic service fee** for the funeral director/staff to complete permits, obtain copies of the death certificate, prepare obituaries/memorials, shelter the remains, and coordinate burial arrangements.

According to the National Funeral Directors' Association, the median cost of an adult funeral with viewing and burial in 2014 was \$8,158 (includes cost of grave vault). However, this figure does not include the cost of the headstone/marker or other goods and services such as flowers, musicians, officiating clergy, etc. The median cost of an adult funeral with cremation and viewing in 2014 was \$6,078.

Funeral costs are on the rise. To help you plan for the future, the chart below compares the itemized 2004 and 2014 median costs for an adult funeral with viewing and burial.

National Median Cost of an Adult Funeral with Viewing and Burial: 2004 vs. 2014			
Item	2014	2004*	% Change
Non-declinable basic services fee	\$2,000	\$1,460	37.0%
Removal/transfer of remains to funeral home	\$310	\$195	59.0%
Embalming	\$695	\$498	39.6%
Other preparation of the body	\$250	\$174	42.9%
Use of facilities/staff for viewing	\$420	\$339	23.9%
Use of facilities/staff for funeral ceremony	\$495	\$395	25.3%
Hearse	\$318	\$225	41.1%
Service car/van	\$143	\$100	42.5%
Basic memorial printed package	\$155	\$95	63.2%
Metal casket	\$2,395	\$2,100	14.0%
Median Cost of a Funeral With Viewing and Burial	\$7,181	\$5,582	28.6%
<i>Vault</i>	<i>\$1,327</i>	<i>\$998</i>	<i>33.0%</i>
Total Median Cost with Vault Added	\$8,508	\$6,580	29.3%

Source: National Funeral Directors Association (NFDA), www.nfda.org. (*The 2004 prices are not adjusted for inflation.)

National Median Cost of an Adult Funeral with Viewing and Cremation	
Item	2014
Non-declinable basic services fee	\$2,000
Removal/transfer of remains to funeral home	\$310
Embalming	\$695
Other preparation of the body	\$250
Use of facilities/staff for viewing	\$420
Use of facilities/staff for funeral ceremony	\$495
Service car/van	\$143
Basic memorial printed package	\$155
Cremation fee (if firm uses a third-party)	\$330
Cremation casket	\$1,000
Urn	\$280
Median Cost of a Funeral with Viewing and Cremation	\$6,078

Source: National Funeral Directors Association (NFDA), www.nfda.org

To help you or your family members compare funeral home costs, we have printed a cost comparison worksheet below. Funeral homes are legally required to provide you with itemized prices. Prices may vary widely based on the level of service provided, so carefully review the description of what is actually included with each item. Some funeral homes will charge a service fee and markup for goods and services purchased from a third party vendor on your behalf (e.g., flowers, memorial cards). This fee must be disclosed to you.

Funeral Cost Comparison Worksheet			
Item	Funeral Home 1:	Funeral Home 2:	Funeral Home 3:
Basic Service Fee for Funeral Director/Staff (Non-Declinable)			
Remains Removal/Transfer			
Embalming			
Other Body Preparation			
Facility/Staff Use - Viewing			
Facility/Staff Use - Funeral			
Staff Use - Graveside			
Hearse Use			
Service Van/Car Use			
Memorial Printing – Basic Package			
Casket			
Vault			
Cremation			
Other			
Total			

G. Local Funeral Home Contacts

Funeral Home/Locations	Web Site	Phone Number
Benson Funeral Home Location: St. Cloud	http://www.bensonfuneralhome.com/contactus.php	320-252-3132
Daniel Funeral Homes Locations: Clearwater, Paynesville, St. Joseph, St. Cloud, and Sartell	http://www.danielfuneralhome.com/locations.php	800-358-3313 320-251-0383
Miller-Carlin Funeral Home Locations: Albany, Holdingford, St. Cloud, and Upsala	http://www.millercarlin.com/pages/ContactUs/	320-845-2035 320-252-7004
Patton-Schad Funeral and Cremation Services Locations: Melrose and Sauk Centre	http://www.pattonschad.com/contact.aspx	320-256-4249 320-352-3089
Wenner Funeral Homes Locations: Cold Spring and Richmond	http://www.wennerfuneralhome.com/contact-us/	320-685-7762
Williams Dingmann Family Funeral Homes Locations: Avon, Becker, Clear Lake, Eden Valley, Long Prairie, Princeton, Sauk Rapids, and St. Cloud	http://www.williamsdingmann.com/ContactUs.aspx	320-252-2522 320-356-7337

V. Designate Your Funeral Preferences

A. Funeral Payment and Funeral Planner(s)

1. How are you planning to pay for your funeral expenses?

- Funds set aside in a bank or investment account

Financial Institution	
Address & Phone #	
Account #	
Location of Account Documents	

- Life insurance policy

Insurance Company	
Address & Phone #	
Policy #	
Location of Policy	

- I have a pre-paid funeral plan

Provider Name	
Address & Phone #	
Plan #	
Location of Plan Documents	

- Other: _____

2. Who do you want to make your funeral arrangements? (Check all that apply.)

<input type="checkbox"/> Spouse	<input type="checkbox"/> Children
<input type="checkbox"/> Mother	<input type="checkbox"/> Father
<input type="checkbox"/> Sibling(s); Specify:	
<input type="checkbox"/> Other; Specify:	

B. Notifications and Obituary

1. Who do you want to be notified personally—to help spread the word—of your death?

Name	Phone Number

Names for Notification(Continued)	Phone Number

2. What information would you like included in your obituary or memorial?

Type	Description
Surviving Family Members (Name, Relationship, City & State)	
Pre-deceased by: (Name, Relationship)	
Religious/Church Affiliation:	
Military Service	
Clubs/Organizations	
Special Achievements or Recognition	
Other	

3. What information, if any, would you like excluded from your obituary or memorial?

Describe:

C. Burial Process and Headstone/Marker

1. How do you want your remains handled?

Ground Burial in Cemetery

Specify Cemetery and Plot Information:
Cemetery Name/Location:
Plot purchased? <input type="checkbox"/> Yes <input type="checkbox"/> No
Plot #:

Interred in Mausoleum

Specify Cemetery and Crypt information:
Cemetery Name/Location:
Crypt purchased? <input type="checkbox"/> Yes <input type="checkbox"/> No
Crypt #:

Cremation

Specify how ashes should be handled:
<input type="checkbox"/> Ground burial in Cemetery Plot Cemetery Name/Location: Plot purchased? <input type="checkbox"/> Yes <input type="checkbox"/> No Plot #:
<input type="checkbox"/> Interred in Mausoleum Cemetery Name/Location: Crypt purchased? <input type="checkbox"/> Yes <input type="checkbox"/> No Crypt #:
<input type="checkbox"/> Scattered Location to Scatter: Note: Catholic teaching permits cremation—but prohibits scattering of ashes. Check local, federal, and state laws for legality/requirements regarding scattering of ashes.
<input type="checkbox"/> Other Explain:

I have registered to donate my body/organs

Body/Organs Donated to:
<input type="checkbox"/> Ashes will be returned; then should be buried in cemetery Cemetery Name/Location: Plot #
<input type="checkbox"/> Ashes will be returned; then should be interred in mausoleum Cemetery Name/Location: Crypt #:
<input type="checkbox"/> Scattered Location to Scatter: Note: Catholic teaching permits cremation—but prohibits scattering of ashes. Check local, federal, and state laws for legality/requirements regarding scattering of ashes.
<input type="checkbox"/> Other Explain:

2. Have you purchased a coffin, urn, or other receptacle for your remains?

<input type="checkbox"/> Yes	Type Purchased: <input type="checkbox"/> Coffin <input type="checkbox"/> Urn <input type="checkbox"/> Other Purchased from: Description/Style:
<input type="checkbox"/> No, but have preferences:	Describe Preferences:
<input type="checkbox"/> No, and do not have any preferences	

3. Have you purchased a headstone/marker?

<input type="checkbox"/> Yes, I have already purchased a headstone/marker Company Name: Marker Style:
<input type="checkbox"/> No, but I would like the following type/design of headstone/marker: Describe:
<input type="checkbox"/> No, and I do not have any style preference about the headstone/marker

4. What inscription would you like on your headstone/marker?

<input type="checkbox"/> The headstone/marker I purchased is already inscribed
<input type="checkbox"/> I would like the following statement inscribed:
<input type="checkbox"/> No Preference

D. Funeral Type and Visitation

1. What type of funeral do you prefer?

- Traditional church funeral service followed by burial/interment at cemetery
- Direct burial or cremation followed by memorial service at cemetery
- Direct burial or cremation followed by memorial service at funeral home
- Other (e.g. Celebration of Life gathering); Specify:
- No preference or undecided

2. What type of visitation/viewing (if any) do you prefer?

Visitation and Viewing:

Location for Visitation/Viewing?	<input type="checkbox"/> Place of Worship <input type="checkbox"/> Funeral Home
Casket open or closed?	<input type="checkbox"/> Open Casket <input type="checkbox"/> Closed Casket
Specify clothing/ jewelry preferences or other directions:	

No Visitation/Viewing

Other; Describe:

No preference or undecided

E. Funeral Presider and Pallbearers

1. Who would you like to officiate the funeral/memorial service?

Name	Phone Number
First Choice:	
Second Choice:	
Other Speakers:	

2. Who would you like as pallbearers (if applicable)?

Suggested Name	Phone Number

F. Special Services (Military, Other)

1. What special services would you like included in the funeral/memorial service?

Type	Organization and Phone Number
Military:	
Religious Organization:	
Other	

G. Flowers and Adornments

1. What type of flower arrangements or adornments do you prefer? (Check all that apply.)

- Casket adornments (e.g., rosary, cross, wreath, etc.); Specify:
- Casket spray of flowers
- Standing spray/arrangement of flowers
- Other; Specify:
- No flowers
- No preference or undecided

Comments or Other Instructions:

H. Music and Readings

1. What are your music preferences for the funeral or memorial service?

<input type="checkbox"/> Cantor/soloist	Specify:
<input type="checkbox"/> Live music group	Specify:
<input type="checkbox"/> Pre-recorded music	Specify:
<input type="checkbox"/> Congregational	Specify:
<input type="checkbox"/> Other:	Specify:
<input type="checkbox"/> No preference or undecided	

2. What are your reading preferences for the funeral or memorial service?

<input type="checkbox"/> Readings:	Specify:
<input type="checkbox"/> Other:	Specify:
<input type="checkbox"/> No preference or undecided	

This page is left intentionally blank. This is the end of the personal information and funeral planning guide. The next section illustrates the form that the Church of St. Benedict uses to coordinate a funeral/burial.

VI. Church of St. Benedict's Funeral Planning Form

This section illustrates the form used by church staff to coordinate a funeral at the Church of St. Benedict. Your family can use the information collected in Section V. of this guide to work with church staff to carry out your funeral wishes.

A. Deceased Person's Information			
Full Name of Deceased (First/Middle/Last)	Date of Birth	Date of Death	Address Street/City/State/ZIP

B. Family Contact Information	
Contact Name	
Relationship	
Address Street/City/State/ZIP	
Phone #	
Email Address	

C. Name of Funeral Home
<input type="checkbox"/> Benson <input type="checkbox"/> Daniel <input type="checkbox"/> Miller-Carlin <input type="checkbox"/> Patton Schad <input type="checkbox"/> Wenner <input type="checkbox"/> Williams Dingmann <input type="checkbox"/> Other:

D. Visitation Information		
<input type="checkbox"/> At Funeral Home	<input type="checkbox"/> At Church	<input type="checkbox"/> None
Date:	Date:	
Start Time:	Start Time:	
End Time:	End Time:	
Parish Prayers Start Time:	Parish Prayers Start Time:	

E. Funeral Service/Liturgy Details (Refer to Section V. of the planning guide for deceased's preferences.)	
Funeral Date	
Time	
Presider	
Pall covering (e.g., cloth or flag)	<input type="checkbox"/> Cloth <input type="checkbox"/> Flag <input type="checkbox"/> Other: <input type="checkbox"/> None
Christian Symbols (Special family items for casket/procession)	<input type="checkbox"/> Bible <input type="checkbox"/> Cross <input type="checkbox"/> Other:
First Reading	Selection: Read by:
Second Reading	Selection: Read by:
Gospel Reading	Selection: Read by Presider

