



FUNERAL INSURANCE DIRECT
— HELPING WITH PEACE OF MIND —



LEGACYARMOUR
Live Forever Today

FINAL

WISHES

Planning Guide

INTRODUCTION



“By failing to prepare, you are preparing to fail.”

Benjamin Franklin



Preparing for events, especially inevitable events, is the best way to ensure that your wishes and desires are fulfilled, but preparing takes more than just thinking about what you might want or even writing down your wishes and desires. Sharing and communicating your thoughts and desires are vitally important.

Funeral Insurance Direct and LegacyArmour have teamed together to ensure that your wishes and desires are recorded and then stored securely so they can be delivered to the people who need to know when the time is right.

This planning guide will help you think through the many decisions that others will have to make and provide them a guide to your thoughts.

Once completed with your Funeral Insurance Direct agent, this document (and others!) will be store securely in a LegacyArmour vault and will be delivered to the people you designate, when you designate.

At the end of the form, we also suggest other documents that you should consider having and storing securely.

Fill out as much of the form as you can, but feel free to leave anything blank that doesn't apply or which you wish others to decide at the time.

1. FUNERAL PLANS

I prefer:

Visitation/Funeral Service

To HAVE a visitation/funeral Service

Public

Private

Location:

Funeral Home/Mortuary

Church

Chapel at Cemetery/Memorial Park

Graveside

Other

Preferred Funeral Home / Mortuary:

Address:

Phone Number:

Religious Preference:

Preferred Celebrant/Clergyman:

Participating Organizations: (Military, Lodge / Social Group, etc.)

To NOT HAVE a visitation/funeral Service

Burial

Burial

My body SHOULD NOT be present at a visitation/funeral service

My Body SHOULD be present at a visitation/funeral service

Open Casket During Service

Closed Casket During Service

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Cremation

Before Visitation/Funeral Service

My cremated remains PRESENT at Service

My cremated remains NOT PRESENT at Service

After Visitation Funeral Service

My body SHOULD NOT be present at a visitation/funeral service

My Body SHOULD be present at a visitation/funeral service

Open Casket During Service

Closed Casket During Service

Urn

Keepsake Urn

Scattering Urn

Other

Other

Casket Type

Wood

Metal

Cremation Casket

Other

Flag

Folded

Draped

No Flag

Presented to:

Personal Accessories

Wedding Band

Stays On

Presented to:

Eyeglasses

Stays On

Presented to:

Watch

Stays On

Presented to:

Stays On

Presented to:

Stays On

Presented to:

Memorialization

Upright Monument

Flat Marker

Cremation Memorial Plaque

As customary for graveyard

Other

Inscription:

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Desired Funeral Music

Desired Pall Bearers

Desired Obituary

Desired Readings and Readers

Specific people to notify (with phone number if available)

Any other instructions you would like to pass on to others?

2. ADDITIONAL THINGS FOR FAMILY MEMBERS TO DO AT THE TIME

Notify immediate family and close friends

Notify Priest/pastor/rabi/imam/religious leader/officiant

Coordinate with funeral director

Transfer from place of death*

Apply for death certificate*

Apply for burial permit*

Notify employer

Notify Lawyer and Executor

Notify Insurance companies

Request military funeral

Arrange fraternal order ceremony

Notify Pall Bearers

Notify eulogizers

Arrange readers

Coordinate hospitality, lodging, food for family and friends traveling.

Order grave marker

* May be handled by funeral home or cremation provider.

3. DEATH CERTIFICATE INFORMATION

Full name:

Maiden Name:

Date of Birth

Place of Birth

Sex:

Race:

Full name of father:

Birthplace of father:

Full Maiden Name of Mother:

Birthplace of Mother

Social Security Number:

Marital Status

Spouse Name:

Occupation:

Employer:

Type of Business

Years at Occupation:

Education (Years Completed)

Residence Street Address:

Residence City, State, Zip

County:

Years in County:

Military service (From – To)

Branch of Service:

Served where:

4. OTHER DOCUMENTS YOU MAY WANT PROTECTED

About Me

- Family Members
- Social Media Accounts
- Emergency Contacts
- Home & Real Estate
- Pets

Financial

- Bank Accounts
- Investment Accounts
- Life Insurance
- Financial Advisors
- Benefits/Pensions
- Disability Insurance

Health (Suited for the Health Vault)

- Health Insurance
- Health Directive
- Health Providers
- Medications

Letters to Families/ Special wishes & Instructions

Estate Documents

- Will
- Power of Attorney
- Trusts
- Attorney Information

Elder Care

- Elder Care wishes
- Care Providers