



# *Peace of Mind*

A GUIDE TO **HONORING YOUR LIFE** WITH EASE.

## Inside You Will Find

This planner serves as a loving guide. It is a place where all the important details and steps are gathered to make things easier for those you care about. It includes information on benefits, key decisions, memorial arrangements, and other essential tasks that would otherwise fall to your family during a difficult time.

By planning ahead, you give your loved ones the gift of peace by allowing them to focus on honoring your life and beginning their healing journey, rather than making stressful decisions. We are here to walk with you through this process, and when the time comes, we will be here for your family too.

***Your thoughtfulness today will bring comfort tomorrow.***

### VITAL INFORMATION

- Personal & Partner Information
- Family Background
- Fond Memories

### BENEFITS & FIRST STEPS

- First Steps
- Arrangement Conference
- Social Security
- Veterans

### CHOICES & INFORMATION

- Funeral, Cemetery & Headstone
- People to Contact
- Glossary

\*Items noted with an asterisk indicate required information for the issuance of death certificates.

PERSON ONE

First Name\* Middle Name\*

Last Name\* Maiden Name\*

Address

City State Zip Phone

Birth Date\* Location / City / State\*

Social Security Number\* Ethnicity

Father's Full Name and Birthplace\*

Mother's Full Name (Maiden) and Birthplace\*

Marital Status:  Married  Divorced  Widowed  Never Married

Spouse's Full Name (Maiden, if applicable)\*

Highest Education Completed\*: (Required in most states)

- 8th Grade or Less  9-12th Grade  High School Graduate-GED
- Some College  Associate's Degree  Bachelor's Degree  Master's Degree
- Other: \_\_\_\_\_

Occupation (Job Title) Industry

Veteran\*  Yes  No Branch/Provide DD214 discharge paperwork

Legal Next Of Kin Name

Address

City State Zip Phone

Number Of Certified Death Certificates Requested: \_\_\_\_\_

The number of copies needed varies based on the number of assets and liabilities remaining in a person's estate. Your funeral director can offer advice based on your personal situation.

PERSON TWO

First Name\* Middle Name\*

Last Name\* Maiden Name\*

Address

City State Zip Phone

Birth Date\* Location / City / State\*

Social Security Number\* Ethnicity

Father's Full Name and Birthplace\*

Mother's Full Name (Maiden) and Birthplace\*

Marital Status:  Married  Divorced  Widowed  Never Married

Spouse's Full Name (Maiden, if applicable)\*

Highest Education\*: (Required in most states)

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PERSON ONE

# Family

The information you share here can help ease a difficult moment by providing your loved ones with guidance as they write an obituary that reflects you. Please list names as you would like them to appear. The typical format for names is: *First Name (Spouse) Last Name*

Spouse: \_\_\_\_\_

Children: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Grandchildren: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Great Grandchildren: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Siblings: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Family (please include relationship): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Preceded in Death By (please include relationship): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## PERSON ONE

*Biography*

The following are optional categories to spark ideas concerning how a life should be summarized. We hope this guide is a helpful outline for a personalized life history.

Childhood: \_\_\_\_\_  
\_\_\_\_\_

Schooling: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Marriage/Family Details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Memberships & Organizations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Hobbies: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Special Traits: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Memorial Designations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PERSON TWO

# Family

The information you share here can help ease a difficult moment by providing your loved ones with guidance as they write an obituary that reflects you. Please list names as you would like them to appear. The typical format for names is: *First Name (Spouse) Last Name*

Spouse: \_\_\_\_\_

Children: \_\_\_\_\_  
\_\_\_\_\_

Grandchildren: \_\_\_\_\_  
\_\_\_\_\_

Great Grandchildren: \_\_\_\_\_  
\_\_\_\_\_

Siblings: \_\_\_\_\_  
\_\_\_\_\_

Other Family (please include relationship): \_\_\_\_\_  
\_\_\_\_\_

Preceded in Death By (please include relationship): \_\_\_\_\_  
\_\_\_\_\_

## PERSON TWO

# Biography

The following are optional categories to spark ideas concerning how a life should be summarized. We hope this guide is a helpful outline for a personalized life history.

Childhood: \_\_\_\_\_  
\_\_\_\_\_

Schooling: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employment: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Marriage/Family Details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Memberships & Organizations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Hobbies: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Special Traits: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Memorial Designations: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Collect benefits with ease

At the time of death, the Social Security Administration will send a small lump sum death benefit to a surviving spouse and/or dependent children to eligible recipients.

### SOCIAL SECURITY BENEFITS

#### Surviving spouse

Must have been living with the deceased. If they were living apart, they must have been eligible for certain Social Security benefits on the deceased's record.

#### Child

Must be eligible for benefits on the deceased's record in the month of death. This generally applies to children who are under age 16, disabled, or 18–19 and a full-time student in elementary or secondary school.

#### Order of priority

If multiple people qualify, the SSA follows a specific order. The surviving spouse who lived with the deceased typically has first priority.

#### Benefit is not automatic

A claim must be filed to receive the lump-sum payment.

#### Benefit is separate from monthly survivor benefits

The lump sum payment is a one-time benefit, not to be confused with monthly survivor benefits that may be paid to other eligible family members.

Funeral Directors are required to send notification of a death to the Social Security Administration by filing Form SSA-721, Statement of Death by Funeral Director. This filing will only notify them of a death; it is your responsibility to contact your local office to discuss changes in your benefits after a death.

For more information, visit the Social Security Administration's website at [www.ssa.gov](http://www.ssa.gov)

### VETERANS BENEFITS

Knowing what government benefits you are entitled to and knowing how to collect them are important in estate planning. Please note that you must apply for these benefits within the specified time period to avoid losing them.

To facilitate receiving veterans' benefits, if eligible, you will need the following before contacting the Veterans Service Office:

- **Discharge Papers – DD 214**

If you do not have a copy, one can be obtained from the Veterans Service Office in the County in which the Veteran enlisted.

- **Service Serial Number & Social Security Number**

- **Marriage License**

- **Children's Birth Certificates**

- **Death Certificate**

For more information, please visit the Department of Veterans Affairs website at [www.vba.va.gov](http://www.vba.va.gov)

#### Record the service serial number(s):

---

PERSON ONE: SERVICE SERIAL NUMBER

---

PERSON TWO: SERVICE SERIAL NUMBER

## First steps after a loss

This section gently guides you through the important tasks that follow a passing. Please know that every effort has been made to ease this process for you and your loved ones. Many of these steps can be completed ahead of time through pre-planning, and those items are marked with an asterisk (\*).

### NOTIFY IMMEDIATELY

- Hospice/911/Local Authorities
- Funeral Director
- Cemetery
- Individuals in Contact List
- Relatives & Friends
- Deceased's Employer/Employees
- Attorney & Accountant
- Insurance Agents
- Clergy & Place of Worship

### DECIDE & ARRANGE

- Meet with Funeral Director\*
- Cemetery\*
- Purchase Burial Property\*
- Select Casket, Vault, & Memorial\*
- Select Location of Service\*
- Choose Clergy Person to Officiate\*
- Provide Eulogy Information\*
- Choose Floral and Décor\*
- Arrange Music\*
- Arrange Service Type (Military, etc.)\*
- Arrange for Special Memorial Services\*
- Supervision of House, Pets, etc.\*
- Provide Obituary to Newspaper
- Get Addresses for Thank You Cards
- Check & Sign Burial Permit
- Check Will/Planner for Requests
- Order Death Certificate

### REQUIRED INFORMATION TO ESTABLISH RIGHTS FOR INSURANCE, PENSION, SOCIAL SECURITY, ETC.

- Will\*
- Legal Proof of Age/Birth Certificate\*
- Social Security Card or Number\*
- Marriage License\*
- Citizenship Papers\*
- Insurance Policies\*
- Bank Books\*
- Veteran's Discharge Papers\*
- Disability & Pension Claims\*  
(policy numbers & contacts)
- Deed to Burial Property\*
- Bill of Sale of Car
- Tax Returns, Receipts, Checks

### PAYMENTS

- Funeral Service\*
- Burial Plot, Mausoleum, or Niche\*
- Clergy\*
- Headstone\*
- Transportation

### CANCEL OR TRANSFER ACCOUNTS

- Utilities
- Subscriptions
- Credit Cards
- Loans
- Memberships
- Bank Accounts
- Vehicle

### PREPARING FOR AN ARRANGEMENT CONFERENCE WITH FUNERAL DIRECTOR/HOME

Completing this packet will take you through the majority of questions that will be needed soon after a time of loss. It is still necessary to finalize legal documents and confirm plans are complete.

Please bring the following items to your meeting with the funeral home:

- A Photo
- Clothing if Applicable  
(Including undergarments)
- Military Discharge Forms – DD 214
- Life Insurance Paperwork  
(If assistance with claim is needed)
- \_\_\_\_\_
- \_\_\_\_\_

## PERSON ONE

## SELECT TYPE OF SERVICE

- Funeral with Viewing and Cemetery Burial  
 Funeral with Viewing Followed by Cremation  
 Immediate Burial with No Ceremonies  
 Cremation with Memorial Service/Celebration of Life  
 Cremation with No Ceremonies

Place of Burial/Disposition: \_\_\_\_\_

Place of Visitation: \_\_\_\_\_

- Evening Before    One Hour Before Ceremony

Place of Ceremony: \_\_\_\_\_

Clergy: \_\_\_\_\_

Musician(s): \_\_\_\_\_

Clergy: \_\_\_\_\_

Music Requests: \_\_\_\_\_

\_\_\_\_\_

Pallbearers (6-8): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Honorary Bearers: \_\_\_\_\_

\_\_\_\_\_

Military Honors:

- Rifle Volleys    Taps    Presentation of the Flag    None

Branch of Service: \_\_\_\_\_

Other Requests: \_\_\_\_\_

Casket Selected: \_\_\_\_\_

Urn Selected: \_\_\_\_\_

Outer Burial Container (Vault) Selected: \_\_\_\_\_

Other Thoughts/Requests: \_\_\_\_\_

## PERSON TWO

## SELECT TYPE OF SERVICE

- Funeral with Viewing and Cemetery Burial  
 Funeral with Viewing Followed by Cremation  
 Immediate Burial with No Ceremonies  
 Cremation with Memorial Service/Celebration of Life  
 Cremation with No Ceremonies

Place of Burial/Disposition: \_\_\_\_\_

Place of Visitation: \_\_\_\_\_

- Evening Before    One Hour Before Ceremony

Place of Ceremony: \_\_\_\_\_

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Musician(s): \_\_\_\_\_

Clergy: \_\_\_\_\_

Music Requests: \_\_\_\_\_

\_\_\_\_\_

Pallbearers (6-8): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Honorary Bearers: \_\_\_\_\_

\_\_\_\_\_

Military Honors:

- Rifle Volleys    Taps    Presentation of the Flag    None

Branch of Service: \_\_\_\_\_

Other Requests: \_\_\_\_\_

Casket Selected: \_\_\_\_\_

Urn Selected: \_\_\_\_\_

Outer Burial Container (Vault) Selected: \_\_\_\_\_

Other Thoughts/Requests: \_\_\_\_\_

Funeral arrangements with: \_\_\_\_\_

## Making a Funeral Personal

Funerals should reflect the life of the person being remembered. Every individual has their own beliefs, values, and preferences, which make them unique. By establishing a plan, and ensuring loved ones carry on requests, you can trust that an individual is represented in a genuine way.

### *Cemetery Preference*

Cemetery: \_\_\_\_\_

City & State: \_\_\_\_\_

Plot Owner: \_\_\_\_\_

Cemetery Deed / Location: \_\_\_\_\_

Section

Block

Lot

Space(s)

Special cemetery regulations: \_\_\_\_\_

Preference in cemetery plot location: \_\_\_\_\_

# *More Than a Memorial*

## PRE-PLANNING REFLECTION

### **A Place to Reconnect Forever**

Every life is one of a kind, filled with experiences and relationships that deserve to be honored uniquely. A memorial should be a timeless tribute to a life well-lived, offering a place where a legacy lives on for generations.

Sunburst Memorials has been honored to work with your family and friends for over 100 years. We would be honored to share our vast selection of memorial options. Our in-house experts can create custom designs to truly represent individual visions. For inspiration visit **[SunburstMemorials.com](https://www.sunburstmemorials.com)**

**Loved ones**, see on the following pages the preferences we have made in advance regarding our memorial(s). Note that we may have already begun the process with a Sunburst Memorials consultant. Connect with them directly for more information and steps make our memorial(s) truly reflect us. If we have finalized the memorial purchase, they can help with arrangements to add our final date(s).

Sunburst Memorials contact: \_\_\_\_\_

# Memorial Preference

We understand this can feel overwhelming, but we promise to make the process simple, stress-free, and will be here to guide you every step of the way. Let us help you design the perfect memorial. For inspiration visit [SunburstMemorials.com](http://SunburstMemorials.com)  
Things to think about before your appointment with the Memorial Consultant

PERSON ONE

How do you want your name listed?

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Middle Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
Maiden Name

What are your favorite colors? \_\_\_\_\_

What emblems are important to you?

Faith, family, furry friends, hobbies, nature, sports, etc. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Are there pictures or scenes you want included? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you like clean, smooth finishes or a natural, rough look? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Are you a veteran and will want a bronze plaque or medallion attached?

\_\_\_\_\_  
\_\_\_\_\_

Have you seen a headstone or artwork that caught your eye?

\_\_\_\_\_  
\_\_\_\_\_

Do you want room for flowers or plants to be placed? \_\_\_\_\_

Do you want a headstone, bench, columbarium, mausoleum, private estate?

\_\_\_\_\_  
\_\_\_\_\_

Do you want your children/grandchildren listed?

\_\_\_\_\_  
\_\_\_\_\_

What story do you want your memorial to tell? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

PERSON TWO

How do you want your name listed?

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Middle Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
Maiden Name

What are your favorite colors? \_\_\_\_\_

What emblems are important to you?

Faith, family, furry friends, hobbies, nature, sports, etc. \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Are there pictures or scenes you want included? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Do you like clean, smooth finishes or a natural, rough look? \_\_\_\_\_

Are you a veteran and will want a bronze plaque or medallion attached?

\_\_\_\_\_  
\_\_\_\_\_

Have you seen a headstone or artwork that caught your eye?

\_\_\_\_\_  
\_\_\_\_\_

Do you want room for flowers or plants to be placed? \_\_\_\_\_

Do you want a headstone, bench, columbarium, mausoleum, private estate?

\_\_\_\_\_  
\_\_\_\_\_

Do you want your children/grandchildren listed?

\_\_\_\_\_  
\_\_\_\_\_

What story do you want your memorial to tell? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

# Glossary of Terms

**Burial Vault:** A protective outer container, typically made of concrete, metal, or plastic, that surrounds a casket or urn to protect it from the weight of the earth and to maintain the integrity of the grave, preventing ground collapse.

**Cash Advance Items:** Goods and services furnished by a third party and paid for by the funeral home on your behalf (obituary notice, flowers, headstone, final date, etc.)

**Columbarium:** A structure with shelves or recesses (niche) for the placement of cremation urns.

**Remains:** The remains of a body after cremation has taken place – Cremated Remains.

**Cremation:** The process that reduces the body by heat to bone fragments. The fragments are then pulverized, which reduces the bone to the consistency of coarse sand.

**Crematory:** A building with a furnace called a retort used to cremate human remains.

**Direct Burial:** The body is transferred from the place of death to the funeral home, placed in a casket, and then delivered to the burial site. There is no public viewing or services.

**Direct Cremation:** The body is transferred from the place of death to the funeral home, placed in a container, and delivered directly to the crematory. There is no public viewing or services.

**Disposition:** The final resting place for the body or for cremated remains. Choices include burial of the body in the earth or a mausoleum; burial, scattering or deposit of cremated remains in an urn for placement in a niche or to take home; donation of the body to a research facility; or burial at sea (not permitted in the Great Lakes).

**Earth Burial:** Interment of a body in a grave.

**Embalming:** The treatment of human remains with chemicals to sanitize or disinfect and temporarily preserve the body.

**Entombment:** Placement of the body in a casket above ground in a mausoleum.

**Grave Liner:** A steel or concrete liner for a grave required by cemeteries to prevent the collapse of a grave after burial. State law does not require a grave liner.

**Graveside Service:** Formal committal services are conducted at the cemetery.

**Hospice:** An organization dedicated to the care of the terminally ill.

**Informant:** The personal representative who is responsible for providing statistical information of a deceased person. (Required if there is no next of kin.)

**Interment:** The act of burial.

**Marker:** A monument or memorial to mark the place of burial.

**Mausoleum:** A structure or building in which a casket burial is above ground.

**Memorial Service:** A ceremony to honor and remember someone who has died, typically held after the body has been buried or cremated, often weeks or months later, and features personalized tributes like music, readings, photos, stories, and displays of personal items, without the casket present (though an urn might be).

**Niche:** A shell-like space inside a building or structure, which is called a columbarium. Urns are placed in these niches as a final resting place for cremated remains.

**Preneed, Prearranging or Pre-planning:**

Planning a funeral in advance of a death, usually consisting of a list of your preferences for the funeral or memorial service. This can also be done with the cemetery plot and headstone.

**Pre-funding:** Same as prearrangement defined above, except that the funding for the funeral is paid in advance, either through a trust or life insurance.

**Price List:** An itemized list of funeral goods and services and their costs.

**Traditional Service:** A religious service with the body present, usually preceded by a visitation or wake.

**Urn:** A container in which cremated remains are kept; may be made of various materials, including wood, marble, metal, or biodegradable materials.

**Visitation / Wake:** A scheduled time when family and friends pay their respects; also referred to as a 'viewing', 'calling hours', 'family hour' or 'wake'.

# Your Story

Note the people you would want informed when the time comes.

PERSON ONE

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

PERSON TWO

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email

Name

Relationship

Phone or Email



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**MEMORIALS**

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