BurialInsurance60

FREE CHECKLIST

The burial plan checklist

Papers, calls and wishes in one place

Tick each box and write the date. Keep the finished folder where your family can find it.

Papers to gather

- [ ] Cemetery deed or certificate of interment rights
- [ ] Any pre-need contract with the cemetery or a funeral home
- [ ] Life insurance policy, insurer name and claims phone number
- [ ] Beneficiary form, with a backup name
- [ ] Photo identification and Social Security number
- [ ] Military discharge papers, if you served
- [ ] Marriage certificate, if a spouse is to be buried beside you
- [ ] A list of contacts: family, clergy, attorney, agent

Calls to make

- [ ] Cemetery office: current fees and rules, in writing
- [ ] A funeral home: the general price list
- [ ] A funeral home: does it accept an assignment of a policy benefit?
- [ ] A monument dealer: price for lettering or a marker, if needed
- [ ] Your clergy or community: customs on timing and preparation
- [ ] VA: pre-need eligibility, if you are a veteran

General education, not insurance, legal or tax advice. Figures are examples unless a source is named. Prices and rules vary by state and insurer.

Wishes to write down

Where I want to be buried

Funeral home I prefer

Casket, shroud or other covering

Date or timing I want, if any

Readings, music or clergy

Marker or stone, and the wording

People to tell

Person who will make arrangements

Backup person

Where the folder is kept

Where the policy is kept

> A policy pays the person you name. The cemetery and the funeral home are paid by that person unless an assignment says otherwise.

Sources

- FTC: Shopping for funeral services
  consumer.ftc.gov/articles/shopping-funeral-services
- NAIC: Life insurance consumer guide
  content.naic.org/consumer/life-insurance.htm

Want to price a policy for your plan? Visit burialinsurance60.com.

burialinsurance60.com/quote or call (888) 635-3511

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