SNODGRASS
FUNERAL HOME
Honoring Life

PRE PLANNING CHECKLIST

☐ **Complete the Biographical Information**
It is recommended that you complete the information, provide the funeral home with a copy, discuss this with your family and keep it in a safe location where your loved ones know how to obtain it when the need arises.

☐ **Consult with Your Insurance Agent Regarding Policies and Beneficiaries**
It is a good idea to make sure your beneficiaries are up to date on any and all policies you may have. Make sure you review this information and make necessary changes regularly.

☐ **Consult with Employer Regarding Life Insurance Policies**
Some employers offer Life Insurance on their employees.

☐ **Consult with Your Financial Advisor or Financial Institutions Regarding Financial Accounts Held Individually or Jointly**
You should know the policies and procedures of your financial institutions as well as updating and maintaining any accounts with beneficiaries.

☐ **Consult with Your Attorney**
Not only can your attorney assist you in making a legal binding will, your attorney can also advise you on the entire pre-planning process.

☐ **Make a Will**
It is recommended that you consult with an attorney in making a legal binding will.

☐ **Review Medical Power of Attorney and Living Will Information**
In the event you cannot make decisions for yourself you should appoint someone to make those decisions for you, based upon your wishes.

☐ **Make End of Life Care Decisions**
Review your options for End of Life Care. This includes Organ and Tissue Donations (CORE), Full Body to Science Donations (Human Gift Registry of WV), Advanced Medical Directives (Living Will and Medical Power of Attorney). It is recommended that you discuss and make these decisions with your family.

☐ **Make Decisions Regarding Your Final Disposition**
If you do not already own a cemetery plot you may want to consult with the cemetery of your choice regarding the option you have available to you and your family. Even if you choose to be cremated, cemeteries offer options for this as well.

☐ **Place All Paperwork and Your Biographical Information Together in a Safe Location and Notify Your Family of This Location**
It is recommended that you keep all your information together in a safe location. We also recommend that you discuss this with your family letting them know where they can obtain the information when the time arises.

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PRE-PLANNING PAPERWORK CHECKLIST

- ☐ Biographical Information Sheet
- ☐ Will
- ☐ Cemetery Information Including Deeds
- ☐ Veteran's Discharge / Enlistment / Awards / Honors
- ☐ Insurance Policies Including All Life Insurance Policies Held
- ☐ Financial Documents / Statements
- ☐ Living Will
- ☐ Medical Power of Attorney
- ☐ Real Estate Deeds / Other Property Owned
- ☐ Titles to Vehicles Owned
- ☐ Copy of Last Years Tax Returns
- ☐ Copies of Paid Tax Receipts