



*Personal
Planning Guide*

*United Pre-Need Funeral Plans, Inc
United Funeral Directors Benefit Life Insurance Company
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CONSIDER THE BENEFITS OF PRE-PLANNING

A Prepaid Funeral Benefits Plan allows an individual to plan their funeral service in detail, and as they wish, in advance. Surviving family members will not have to determine exactly what the deceased would want included. It allows an individual to determine exactly what they wish to spend on their service and to prefund that amount. It guarantees the price for the items selected no matter how far into the future the funeral is delivered. Family members will not have to raise the funds to pay the expense thereby eliminating any hardship that might result. It will eliminate much of the stress for the family and will allow them to memorialize the deceased in a way that brings the family closer.

Specifically, the benefits are accomplished through a Prepaid Funeral Benefits Contract between the individual and a funeral provider. The contract includes a Statement of Funeral Goods and Services itemizing the items selected, including the cost for each item. The benefit of each item can be measured against the cost thereby making choices based on both desire and affordability.

Funding is available through the purchase of a life or annuity insurance policy specifically designed for that purpose. Payment plans can be chosen specifically tailored to the financial ability of the purchaser. The plans available are single pay, 3, 5, 7 and 10 pay. Once the designated payments have been made, the contract is paid-in-full and no other payments are required.

Another important benefit is the inclusion of a Personal Planning Guide Provided by the funeral home. This guide allows the individual to provide, in advance, the legal and personal information that the funeral home needs to meet any City, County or State requirements to record the death. Family history and personal data can be listed by the individual. There will be no frantic searches necessary by family members to find the information. The minister as well as other persons such as pallbearers and musicians can be pre-selected. Persons who they wish to be contacted can be listed. The location of important documents such as wills and property titles can be recorded in the guide.

Finally, funeral arrangements are one of the realities of life...and yet are one of the most neglected areas in a person's future planning. Experience tells us that survivors that have no guidelines from their deceased family member are often confused about what to do and how much to spend.

It is hoped that this guide will help you make a decision to plan.

To My Loved Ones

I wanted to spare you as much anxiety, grief, and expense as possible at the time of my death, so in this guide, I've given you some information and instructions in advance. I hope they will relieve some pressure in making my arrangements at a difficult time.

Please accept these arrangements on the spirit they are given: With love, hoping to comfort you and help you remember the best of times we shared.

Signature _____ Date _____

Vital Statistics Record

Name (First, Middle, Last) _____ Sex _____ Race _____

Address _____ City _____ State _____ Zip Code _____

Phone _____ Birth Date _____ Birthplace (City & State) _____

Citizen of What Country _____ Social Security Number _____ - _____ - _____

Marital Status _____ Marriage Date _____ Where were you married _____

Never Married Widowed Divorced

Spouse's Name (If Wife, Give Maiden Name) _____

Education (Highest grade completed) _____ College/University _____ Degree _____

Occupation (Former Occupation if Retired) _____

Father's Name (First, Middle, Last) _____ Birthplace _____

Mother's Maiden Name (First, Middle, Last) _____ Birthplace _____

My Grandparents: _____

My Siblings: _____

My children: _____

My Grandchildren: _____

Military Service (Years) _____ Branch _____

Veteran _____ Rank _____

Enlistment Date & Place _____ Service Number _____

Discharge Date & Place _____

Historical Information

In Community Since _____ Where & When Married _____

Employer _____ Position _____

City _____ State _____ Number of Years _____

Fraternal (or other) Organizations _____

Church _____

Business or Service Organization _____

Additional Information _____

Accomplishments – Sharing your accomplishments, special memories and favorite things will allow your loved ones to remember and cherish you.

My proudest family moments: _____

My proudest career accomplishment: _____

My favorite song: _____ My favorite color: _____

Pastimes and hobbies I enjoy: _____

Other favorite things: _____

Attributes or passions that you wish to share: _____

Memories to share: _____

Family & Friends To Be Notified

1.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
2.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
3.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
4.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
5.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
6.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
7.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
8.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip
9.	_____	_____	_____
	Relationship	Name:	Phone No.
	_____	_____	_____
	City	State	Zip

Personal Information for Family Use

Location of Important Papers

Will _____ Executor _____

Insurance Policies _____

Cemetery Property Deed _____

Military Discharge _____

Funeral Arrangement Documents _____

Safe Deposit Box _____

Additional Information _____

Financial Information

Banking

Bank Name: _____ Branch: _____

User name: _____ Password: _____

Bank Name: _____ Branch: _____

User name: _____ Password: _____

Credit Cards:

____ Visa ____ MasterCard ____ American Express ____ Discover ____ Other

Account no. _____ Expiration Date: _____

User name: _____ Password: _____

____ Visa ____ MasterCard ____ American Express ____ Discover ____ Other

Account no. _____ Expiration Date: _____

User name: _____ Password: _____

____ Visa ____ MasterCard ____ American Express ____ Discover ____ Other

Account no. _____ Expiration Date: _____

User name: _____ Password: _____

Life Insurance/Benefits:

Location of Policy: _____

Type: _____Term _____Whole life _____Universal _____Group _____Other

Financial Assets: _____

Type: _____ Description: _____

Location: _____

Company contact: _____ Phone No.: _____

Other loan information: _____

E-mail and Social Media

Account name: _____ Web Address: _____

Username: _____ Password: _____

Other Information: _____

Account name: _____ Web Address: _____

Username: _____ Password: _____

Other Information: _____

Account name: _____ Web Address: _____

Username: _____ Password: _____

Other Information: _____

Account name: _____ Web Address: _____

Username: _____ Password: _____

Other Information: _____

Account name: _____ Web Address: _____

Username: _____ Password: _____

Other Information: _____

Funeral Service Instructions and Information

Place of Service: Chapel _____ Church _____ Graveside _____

Burial _____ Entombment _____ Cremation _____

Space _____ Lot _____ Section _____ Cemetery _____

Floral preference: _____

Remarks _____

Minister / Priest / Rabbi Name _____

Favorite Bible / Literature Passage _____

Pall Bearers:	Name	Phone	Name	Phone

Organist Name _____ Soloist Name _____

Music Selections _____

Visitation: Yes _____ No _____ Casket Open _____ Closed _____

Flag: Yes _____ No _____ Folded or Drape Casket _____

Clothing: From Current Wardrobe: _____ New _____ Other _____

Jewelry, Rings, Etc. _____ Glasses on or off? _____

Additional Instructions or Information: _____

Authorized Persons to Arrange Final Details _____

Newspaper Notices

Name as it Should Appear in Newspaper _____

Newspaper(s) _____

Donations To: _____

Additional Instructions _____