



## PLANNING AHEAD CHECKLIST

*Bad news never has good timing and the impact of your passing has the potential to cause plenty of financial and emotional headaches for your loved ones. Planning ahead can alleviate these burdens and put your family at ease. Fairmount has compiled a short and simple checklist to help guide you through the essentials of organizing this process. Please contact us for more information and to talk to one of our planning experts.*

### Advanced Health Care Directive

Compiling this document is essential to ensuring your wishes are carried out with regards to prolonging your life, resuscitation and organ donation.

### The necessary documents

Make sure you collect and organize the following documentation in a single location where your family will have access to it, in case of an emergency or your death.

- Court issued divorce documents, including any property settlements, name changes, prenuptial agreements, adoptions, etc.
- Military service papers, including discharge records
- The Will and/or Trust
- Deceased's Final Instructions
- Prepaid Funeral Contracts
- Organ/Tissue Donation Records
- Social Security Card
- Birth Certificates (of all family members)
- Marriage License
- Community Property Agreements
- Domestic Partnership Registrations
- Driver's License
- All citizenship/immigration papers (passport, green card, alien registration)
- Contact information for all close friends and family members
- Contact information for all lawyers, accountants, doctors, etc.
- Create or locate a family tree
- Social media and email login information

### Name your power of attorney

You will want to name a person or legal representative to act on your behalf financially and legally, in the event you are no longer able to do so on your own behalf. You will also need to plan a timeline for the effect of your Power of Attorney; when their role begins and when it ends.

### When to plan and pre-payment

Planning your funeral can be emotionally taxing and daunting. Our specialists at Fairmount can relieve the stress and hassle of this process by guiding you through it, step by step. We also customize payment plans to each individual's ability/comfort level, from single payments to monthly bank withdrawals. Call us or visit us online for more information and to make an appointment.

### Other important points of contact

When planning your ceremony, you'll have choices on everything from the setting, music, religious readings, to the attendees, speakers, and pallbearers (if you choose a burial). Make sure to consider the following:

- Officiant (religious, or otherwise) or conductor to lead your ceremony
- Choose your pallbearers, or "honorary" pallbearers for those who cannot physically lift the casket
- Choose the people to speak at your ceremony and which religious/other readings they will read
- Choose/customize your casket and select a location for the burial, or memorial in the case of cremation
- Select music and flowers to dress up your ceremony
- Organize the order of events