



Life & Legacy Planning Guide

Here at Central Florida Casket Store and Funeral Chapel, we strive to make the hardest moments just a bit easier to manage. Settling one's affairs goes beyond simply planning a burial or cremation. Our lives are rich, with many facets to consider when you or a loved one passes. With this guide, we hope to assist you in the days and weeks to come.

Personal Information, AKA “Vital Statistics”, for the completion of death certificate:

- Full legal name _____
- Preferred name/nickname/alias(es) _____
- Date and place of birth _____
- Social Security number _____
- Parents' names (including mother's maiden)
 - Father: _____
 - Mother: _____
- Last known address _____

- Next of Kin name and relation _____

Important Documents:

- Driver's license
- Social Security card
- Military service details (DD-214)
- Citizenship documents
- Marriage certificates
- Divorce decrees
- Adoption records
- Family tree/contact list

Funeral Preferences:

• Burial

- Chosen casket (*sealed vs. non-gasketed, metal vs. wood, color(s), etc.*)

- Burial vault (*if required by cemetery*)
- Cemetery or mausoleum preference and location
 - Existing plots, if any

- Embalming permission (*For visitation, required by law to be seen by public. Or would you prefer to go without a viewing, utilizing immediate/direct burial, or graveside service only?*) ☐ **Yes** ☐ **No**
- Clothing/jewelry/glasses/dentures/etc. to be worn

• Cremation

- What to do with cremated remains (*i.e. would you be scattered or kept at home? Or would you prefer inurnment in a mausoleum niche or ground burial in a cemetery?*)

- If kept, would your family like an urn, any keepsakes, or jewelry?

- Donation to science? ☐ Yes ☐ No
- Green Burial? ☐ Yes ☐ No

Funeral vs. Memorial Services *(Body present at service, or not?)*

- ☐ Open or ☐ Closed casket for visitation/viewing
- ☐ Religious denomination or ☐ secular _____
- Clergy/officiant/celebrant preference _____
- Service location _____
- ☐ Memorial folders / ☐ prayer cards / ☐ register book
- Flowers ☐ Yes ☐ No
- Military honors ☐ Yes ☐ No
- Fraternal or organizational rites ☐ Yes ☐ No
- Reception preferences ☐ Yes ☐ No _____

Music & Order of Service Details

- Opening/closing music _____
- Favorite songs _____
- Readings or scriptures _____
- Poems _____
- Speakers/eulogists _____
- Pallbearer preferences (6 needed) _____
- Honorary pallbearers _____

Obituary Information

(Check out FuneralFolio.com for an easy, fill-in-the-blank obituary generator)

- Online and/or published in the newspaper?
- Preferred obituary photo
- Additional photos for memorial display/video
- Hobbies, interests, passions
- Unique qualities and memorable traits
- Life achievements to highlight (*Career, school, social, etc.*)
- Organizations to mention (*Church, clubs, teams, etc.*)
- Preceded in death by...
- Survived by...
- Charity donation requests, if any
- Location of service(s), if any
- Other people who should be acknowledged (*Friends, teachers, doctors/nurses, funeral director, hospice, etc.*)
- People who should NOT be contacted

Financial & Legal

- Will location
- Trust information
- Attorney contact information
- Executor information
- Life insurance policies
- Bank accounts
- Safe deposit box information
- Property deeds
- Vehicle titles
- Business ownership information
- Pension information
- Veterans benefits paperwork

Digital Assets

- Password manager location *(If you do not have a Google/Apple/Samsung/etc. account that already has a Password Manager service, try Bitwarden, otherwise write every account username and password you can think of in a journal and place this somewhere your loved ones may find)*
- Master password instructions
- Cell phone passcode
- Computer passwords
- Tablet passwords
- Email account access
- Cloud storage accounts
- Cryptocurrency wallets
- Digital photo storage
- Domain names owned
- Website hosting accounts

Social Media & Online Presence

For each platform:

- Account username and password
- Desired action:
 - Memorialize/archive (*Legacy page*)
 - Delete permanently
 - Transfer management
 - Leave active

Popular platforms to remember may include:

- *Facebook*
- *Instagram*
- *TikTok*
- *X*
- *LinkedIn*
- *YouTube*
- *Reddit*
- *Dating apps*
- *Gaming accounts*

Subscription Services

- Streaming services (*Apple, Disney, Netflix, HBO Max, Peacock, Paramount, etc.*)
- Music subscriptions (*Apple, Spotify, YouTube Premium, etc.*)
- Newspaper/magazine subscriptions
- Software subscriptions
- Cloud storage plans
- Membership clubs
- Professional associations
- Gym memberships
- Meal preparation services

Include:

Account number, Renewal date, Automatic payment source

Pets

- Pet names and breeds
- Veterinary information
- Feeding instructions
- Medications
- Desired caretaker
- Financial arrangements for pet care

Home & Household

- Alarm codes
- Smart home access
- Garage codes
- Storage unit locations
- Key locations
- Utility providers
- Lawn service information
- Housekeeper information

Employment & Business

- Employer contact
- HR contact
- Business partner contact
- Ongoing projects
- Business succession instructions
- Company passwords and systems

Medical Information

- Organ donor status
- Anatomical donation wishes
- Medical records location
- Primary Care Physician contact information
- Prescription information

How to Write a Family Guidance Letter

Ask:

- *What would you like your family to know more about you?*
- *Any final messages?*
- *Family recipes?*
- *Stories to preserve?*
- *Lessons learned?*
- *Advice to pass down to children or grandchildren?*
- *Anything that should not be left unsaid, and who it needs to be said to?*

Legacy & Memory Preservation

- *Voice recordings to save*
- *Videos to preserve*
- *Family photos to archive*
- *Family history information*
- *Genealogy records*
- *Heirloom descriptions*
- *Who should receive specific keepsakes*

"The Things Nobody Thinks About"

Think hard for the unusual items, such as:

- *Loyalty rewards points*
- *Airline miles*
- *Hotel points*
- *Hunting/fishing licenses*
- *Concealed carry permits*
- *Storage units*
- *Digital collectibles/NFTs*
- *Fantasy sports accounts*
- *Online buyer/seller accounts*
- *Frequent shopper rewards*
- *Library cards*
- *School alumni accounts*
- *Fantasy gaming assets*
- *Cryptocurrency holdings*
- *Monetized social media channels*