EFA Pre-Planning Checklist

Organize your wishes and information while you are alive. A clear, step-by-step guide to ensure your loved ones have everything they need.

EVERLASTING
FUNERAL ADVISORS

How to Use This Checklist

Work at Your Own Pace

There's no rush to complete everything at once. This is a living document that grows with you over time.

Matches the EFA App

Each section in this checklist corresponds directly to a section in the Everlasting Funeral Advisors app for easy reference.

Review and Update Regularly

We recommend reviewing your checklist at least once per year or after any major life changes like marriage, divorce, or relocation.

Planning Overview

Review how the EFA system works

Familiarize yourself with the overall structure and understand how each section connects to create a complete plan.

Understand what information you will organize

Get a clear picture of the types of details you'll be recording—from personal wishes to financial accounts and important contacts.

Decide when and how often to review this plan

Set a schedule that works for you. Many people choose to review annually or after significant life events.

My Instructions

Essential First Steps

- **Write "Read This First" instructions**

  Create clear, immediate guidance for those who will need to act on your behalf.

- **List who to contact immediately**

  Identify the key people who should be notified right away, including their phone numbers and relationship to you.

- **Note urgent priorities**

  Document time-sensitive matters like care for children, pets, or securing your home.

Personal and Family Details

Record basic personal information

Include full legal name, date of birth, Social Security number, and other identifying details that will be needed for official documents.

Record household and family details

List immediate family members, their relationships to you, and current contact information for each person.

Note where identification records are stored

Document the location of birth certificates, marriage licenses, passports, and other vital records.

Life Story and Legacy

Share your life story or values

Write about the experiences, achievements, and values that have shaped your life. This becomes a treasured gift for future generations.

Note legacy wishes

Describe how you'd like to be remembered and any causes or organizations that are meaningful to you.

Add information helpful for an obituary

Include key dates, accomplishments, memberships, and the names of loved ones you'd like mentioned.

Important People to Notify and Service Providers

People to Notify

→ **List people to notify**

Create a comprehensive contact list organized by priority level.

→ **Note relationships and priority**

Indicate how each person knows you and when they should be contacted.

→ **Include contact information**

Record current phone numbers, email addresses, and mailing addresses.

Service Providers

→ **Record funeral or cremation provider**

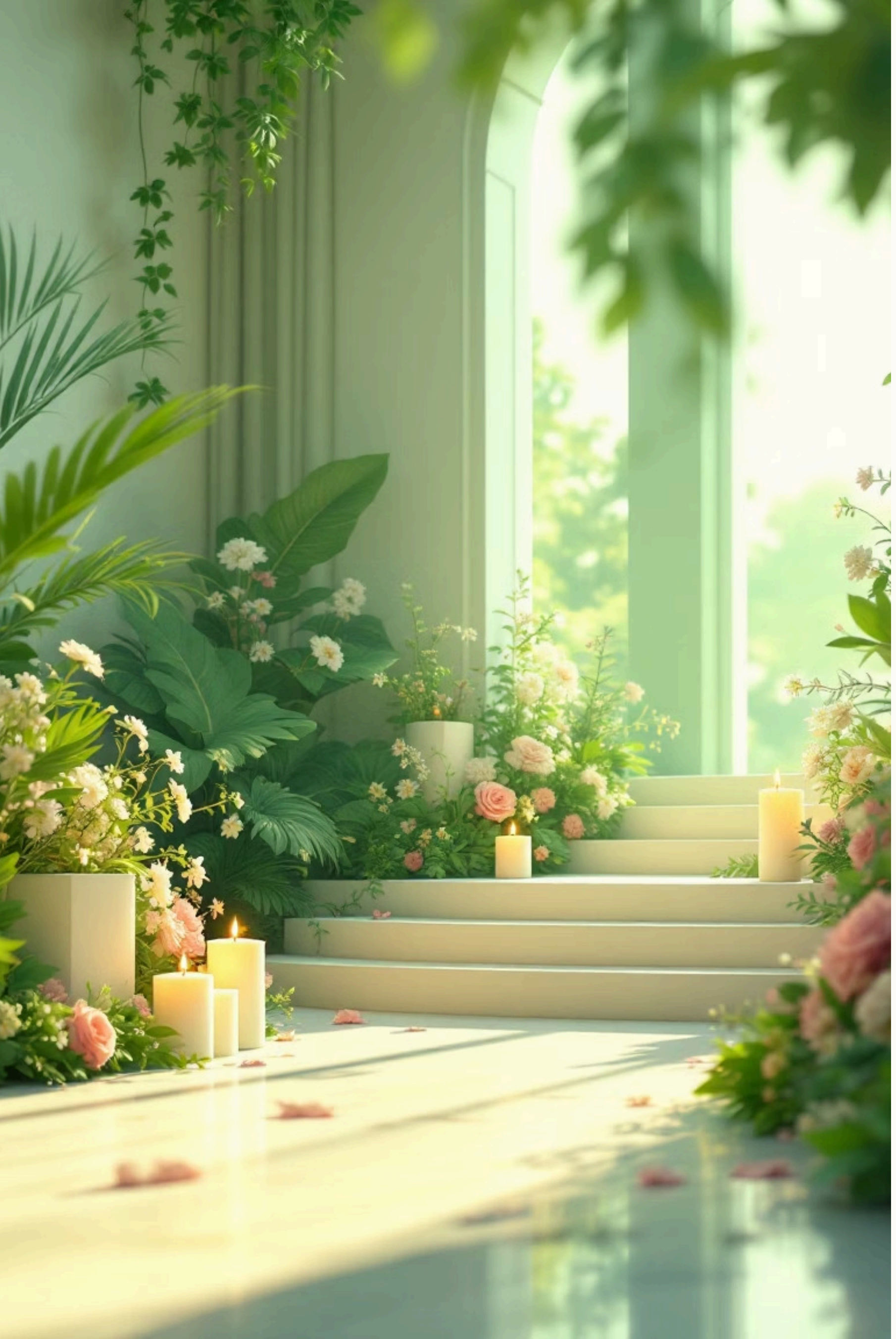
List your chosen provider with full contact details and any pre-arrangements made.

→ **Note cemetery or memorial preferences**

Specify location preferences and document any plots or spaces already purchased.

→ **List clergy or celebrant if applicable**

Include religious or spiritual leaders you'd like involved in your service.



Funeral and Ceremony Wishes

Burial or cremation preference

Clearly state your choice and any specific requests related to that decision, such as urn preferences or burial location.

Ceremony style and tone

Describe whether you prefer a formal service, celebration of life, religious ceremony, or intimate gathering with specific atmosphere in mind.

Music, readings, cultural or religious wishes

List specific songs, poems, scriptures, or cultural traditions you'd like incorporated into your service.

Financial Life and Insurance

List financial accounts

Record all bank accounts, investment accounts, retirement funds, and other financial assets with institution names and account numbers.

List debts or ongoing bills

Document mortgages, loans, credit cards, and recurring bills so they can be properly managed or settled.

Record insurance and benefits information

Include life insurance policies, health insurance, pension benefits, and any other coverage with policy numbers and contact information.

Property, Pets, Digital Assets and Documents

Property and valuables

List real estate, vehicles, jewelry, and other significant possessions. Note where deeds and titles are stored.

Pet care instructions

Provide detailed care information for pets, including veterinarian contacts and the names of designated caregivers.

Online accounts and digital access

Document email accounts, social media, subscriptions, and other digital assets. Include access instructions or password manager details.

Legal document storage locations

Note where to find your will, trust documents, power of attorney, advance directives, and other important legal papers.

Keep It Updated: Review this checklist at least once per year or after major life events like marriage, divorce, retirement, or the birth of a child.

Contact Us: Everlasting Funeral Advisors

Comprehensive Pre-Planning

Expert guidance to organize every aspect of your end-of-life wishes, ensuring peace of mind for you and your loved ones.

Caskets, Urns, Flowers and more

Affordable options

Grief Resources & Legacy Preservation

Connecting families with compassionate grief support and tools to preserve cherished memories and stories for future generations.