

Next Steps for Families

After the Loss of a Loved One

Considerations for a Funeral Guide

*Serving families with information, resources and services
after the loss of a loved one.*

The intent of this booklet is to provide you with materials that can assist you with organizing information after the loss of a loved one. It is suggested that the information you collect on these forms be kept for tracking contacts, conversations, expenses and exchanges of information with agencies.

Plan to keep the information you record for several months for reference in the future. You never know when you will need to refer to the information you have documented.

Our thoughts and prayers are with you as you take care of these final details.

If you find that you need assistance with any of the processes of caring for the property, estate and the final details after a loss, please call Next Steps for Families, LLC to discuss how we can be of service to you.

If you need additional pages of any part of this booklet, you can download individual pages from the **Resources page** at our website www.nextstepsforfamilies.com

Information Provided by
Next Steps for Families, LLC

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Next Steps for Families, LLC is dedicated to serving families with information, resources and services after the loss of a loved one.

If you are in a situation where you need assistance with any aspect of caring for the property, processing possessions or obtaining services for a survivor, please contact us to discuss how we can serve you.

Considerations for a Funeral

Considerations when selecting a funeral home

- Consider where your loved one will be buried. Determine if any burial plots may have been previously purchased.
- You may want to locate a funeral home near the burial site or the church where the services will be conducted.
- Determine if family wish to consider anatomical gifts or donations. Please see the **Helpful Phone Numbers** on the **Information page** for contact information of organizations that accept these gifts.
- Contact a couple of potential funeral homes to find someone you feel comfortable working with at a price you can afford. See our list of **Funeral Homes in Arizona** on the **Information page**.
- Funeral establishment prices and services vary, so it is wise to make sure you understand the charges and options. Funeral homes will have a price list that they can give you. You can also obtain prices over the phone and many funeral homes have a website where they have posted pricing information.
- Be sure you understand what the prices include and any additional fees.

Fees may include

- Chapel services, visitation, hearse, transportation, refrigeration and embalming if necessary or requested.
- Flowers.
- Commemorative programs.
- Church service.
- Cemetery and plot costs are not included in the fees to the funeral home. Check with cemetery to see if there is a prepaid burial plot or an insurance policy.

If you will be having the funeral out of state, there are some additional considerations:

- This will require the involvement of two mortuaries, one that sends the body to the other state, and one that receives.
- This will require charges from both funeral homes.
- Your funeral director will arrange for the transportation, file required permits and authorizations.

If you are considering a cremation, you may want to consider the following:

- The types, if any, of services you would like to have.
- Whether or not you want to have a viewing prior to the cremation.
- Whether or not you want to have the church service with the body present in a casket.
- You have the option of buying or renting a cremation container (and a casket if the service is prior to the cremation).
- Check to see if fees include a casket to be used during any services.

Once a funeral home has been selected

- You can expect the Funeral Director to set an appointment with you. At this appointment the Funeral Director will explain the options to you and assist you in making arrangements.
- You will want to determine if there are any religious requirements for the preparation of the body.
- Determine whether your loved one wished to be buried, cremated, give anatomical donations, or other wishes.
- Determine if the body will need to be transported out of state, or to this state.
- Select clothing to take to the funeral home for the one who has passed away.
- Take documents to the funeral home to assist the Funeral Director in compiling information for the death certificate and obituary.
- Discuss with family who will be responsible for funeral expenses for billing purposes. If there is a personal representative or executor named in a will, this person usually handles this responsibility.

Information you may want to consider for the obituary

- The full legal name of the deceased (nicknames may be included in parenthesis).
- City or town of birth.
- City or town of residence.
- A listing of relatives including: "survived by" --this usually includes parents, spouse, daughters and sons, grandchildren, great grandchildren, and siblings. You may also wish to include 'pre-deceased' family members, meaning those who have already passed away.
- Work history.
- Special interests or hobbies.
- Associations such as memberships in local or national organizations.
- Special affiliations, such as volunteering for an agency or group.
- Military service.
- You may want to consider including a picture.
- Place and time of the calling hours and services.
- The name of the funeral home.
- The location of the burial.
-

An obituary can be in any form you wish; often the format is similar to the following:

Identifying information: The first paragraph usually contains identifying information such as the name, age, place of residence, date and place of death. You may also wish to include the cause of death.

Survived by information: This paragraph usually provides the names of close surviving family members and their relationship to the deceased. You may also wish to include names of close family members who have passed away.

Educational and career information: This paragraph usually gives a brief description of educational and career achievements and milestones.

Most noted for: This paragraph usually identifies how this person will be best remembered as well as contributions made to the family and community. You may want to list memberships, associations and such here.

Funeral information: This paragraph provides information regarding the viewing, funeral details, location of burial and any memorial fund donation information.

Consider where you would like to publish the obituary

It is suggested that families avoid publishing any specific information about the residence so as to avoid any trespassers while the family is attending the services.

- A hometown newspaper.
- A newspaper where a significant number of relatives live.
- A local newspaper.
- The internet --some services and funeral homes offer on-line obituaries.
- Internet memorials --there are several nice on-line memorial sites that allow you to easily create a lasting memorial. These sites offer a variety of features for a fee. Fees vary.
- See our listing of **Arizona Newspapers** on the **Information page** for contact information.

Necessary information to assist the funeral director

The death certificate is the legal record of death. You will need to provide the Funeral Director with information to complete the death certificate.

- The date and place of birth
- Marriage certificate or divorce decree
- Social Security Card
- Military discharge papers
- Parents names
- Place of employment
- Home address

There is a fee for each copy of the death certificate.

- It is recommended that you order several copies of the certified death certificate now with the Funeral Director. You will need certified copies for bank accounts, credit cards, to transfer titles of ownership on property, for your lawyer, for insurance documents, stocks, bonds, etc... Ordering plenty of these certificates now will save you time and effort in the future.
- It is recommended that 10-15 copies be ordered now, however if the estate is very large, you may want to order more copies now.
- You can order additional certified copies from the **Arizona Department of Health Services**, however it may take more time to process your requests.

- See **Vital Records Contact Information for Other States** for access to contact information and instructions to order from other states.

Types of funeral and memorial services

- The Funeral Director will help you to determine the type and extent of services you would like to have.
- The services provide us with an opportunity to say goodbye, but also to recall memories and to celebrate the lives touched by this person.
- Talk with clergy and your funeral director and make the services meaningful for you and your family.

You can decide on a single service or a combination of services:

The services are usually defined as:

Memorial service - a ceremony where the body is not present.

Funeral service - a ceremony where the body is present.

Vigil or viewing - a service held before the funeral, usually the evening before.

Grave-side service - is a service held at the burial site.

Military service - is a service held for Veterans who were honorably discharged. The funeral director will help to initiate this process. It would be helpful to locate the Military discharge papers and take them to the funeral home.

Considerations for the services

Talk to your funeral director and clergy for assistance in preparing for the services. Some things to consider include:

- The time and day you would like the services. Think about those traveling, holidays, religious considerations, etc...
- Scriptures you may like to have read at the services.
- Religious traditions and customs.
- Your preferences and the preferences of other family members.
- Consider a personalized eulogy delivered by a family member or friend.
 - A **eulogy** is a formal expression of praise or recognition for someone who has died recently.
 - Information you may wish to consider for the eulogy:
 - Biographical facts such as marriage dates, places lived, and hobbies or memberships to associations. You are trying to capture the character of the deceased so be sure to contact a variety of individuals who will be able to give you accurate information.
 - For inspiration, you may want to look through photographs, newspapers articles about historical events or about the deceased, or consider family stories, genealogical information, and memories of family outings or events for ideas for a theme. Recalling memories and times shared will help to make the funeral service memorable to those present and help them to remember the celebration of life.

- You may want to include life history information, personal letters from the deceased or excerpts from diaries or memoirs, or recognize personal achievements, publications, successes or ideals.
- Consider special music.
- Consider having a commemorative program made for distribution at the service. Programs often have a picture of the person and list information about the service such as scripture, the names of the family members, the music played at the services, the names of the pall bearers, and any special information you may want to include. Discuss the options with clergy or your funeral director.
- Consider having pictures present at the service or a collage of pictures. You may want a large picture displayed on an easel or perhaps several pictures presented as a slide show. You may also wish to bring a photo album with you to share with family and friends.
- Consider who you may want to serve as pall bearers. There are usually 4-6 pall bearers. Pall bearers are usually not immediate family members. You may consider having the funeral home provide the pall bearers.

Consider floral arrangements

Floral arrangements can be a beautiful addition and tribute to any service. Florists often suggest flowers of white or green plants, but this of course is a decision for the family.

- You may want to consider a wreath or bouquet on an easel. Many people select a heart shape or a cross.
- A floral arrangement may be placed inside the casket during the viewing period; these flowers are usually from the closest family members.
- You may also want to consider a casket spray. The casket spray is atop the casket and is usually from close family members.
- You may want to use other arrangements around the casket on the floor or on plant stands.
- Plan for what you would like to do with the flowers following the funeral.

Other considerations

- Consider what your loved one would have liked in a celebration of their life.
- Consider asking friends and family to email a note to you of favorite memories, recognitions, or stories and combine them for part of the services or a memory book.
- It is customary to make a donation to the clergy, church and those involved in the services.
- Ask the church if they offer a reception following a church service or burial. If they do not, consider having a reception catered for family and friends to celebrate the life of your loved one.
- If you believe that there may be too many flowers, you may want to ask friends and families to make donations to a memorial fund in lieu of additional flowers.

Memorial funds

- You may want to establish a fund for donations to a charity. To do this you can contact the charity or a bank officer to arrange for a fund for donations.
- Some ideas for a donation from a memorial fund include:
 - The place where your loved one died.
 - Hospitals
 - Funds for research for a particular disease.
 - Donation to a charity that your loved one was partial to.
 - Scholarship funds at a school your loved one was partial to.

Keep Records

- Use the forms provided on the **Resources page** to keep track of the people you are talking to and information you are collecting. This information may be very important to you later and it is recommended that you keep fairly detailed records of information and expenditures.
- Print the **Considerations for a Funeral Guide** which provides forms to help you organize and track information. You can also print individual pages from this booklet so that you have an adequate number of the pages you need.

Travel arrangements for family & friends

- Check with the airlines for bereavement fares.
- Also check services such as www.priceline.com, www.travelocity.com, www.expedia.com and www.orbitz.com for air fares and hotel accommodations - bereavement fares are not necessarily the lowest air fares available.
- See our listing of airlines operating from **Sky Harbor Airport** for contact information.
- Have funeral information available to give to family and friends who will be traveling from out of town so that they can make arrangements as soon as possible.

Truly, you and your family are in our thoughts and prayers.

We hope that the information provided here is helpful to you during this difficult time.

*Use the **Considerations for a funeral Worksheet** on the following pages to help*

Keep track of your thoughts and ideas for planning the funeral or memorial services.

Considerations for the Funeral Worksheet

Funeral homes we are considering:

See the **Information page** at www.nextstepsforfamilies.com for a complete listing of funeral homes.

Name / Contact Person	Phone	Location	Options	Pricing

Funeral Home Selected:	
Address of the Funeral Home:	
Time & date of the funeral:	
Location of the funeral:	
Time & date of the viewing:	
Location of the viewing:	
Location of the burial:	
Name of the cemetery:	
Clergy:	
Church location:	

Once you have selected a funeral home:

<p>Clothing or any special items to take to the funeral home or to be placed inside the casket. <i>If there is going to be a cremation, you may want to consider a viewing or service with a casket.</i></p>	
<p>Documents needed by the funeral director: <i>The funeral director will need documents and information to complete the death certificate. (Birth certificate (date & place of birth), marriage certificate, Social Security card, parent's names, place of employment, home address).</i></p>	
<p>Special wishes to consider made by other family members:</p>	
<p>Religious considerations:</p>	

Considerations regarding the funeral service

<p>Time and date you would like the services: <i>Consider those who will be traveling, holidays, etc...</i></p>	
<p>Consider a personalized eulogy delivered by a family member or close friend: <i>See the Considerations for a funeral pages for ideas regarding the eulogy.</i></p>	
<p>Consider who you may wish to serve as pall bearers:</p>	
<p>Consider special musical selections:</p>	
<p>Consider having pictures present: <i>Some ideas include a picture on an easel, a slide show, a collage of pictures.</i></p>	

Consider floral arrangements

Florists often suggest flowers of white or green plants. You may want to consider the kinds of flowers and types and number of arrangements:

<p>Floral arrangement inside the casket: <i>Usually from the closest family members.</i></p>	
<p>A casket-spray for the top of the casket. <i>This too is usually from the closest family members.</i></p>	
<p>Floral arrangements outside of the casket on the ground.</p>	

Ideas for what to do with the flowers after the funeral:	
If you would like family and friends to make donations rather than buying additional flowers, where would you like the donations to go? <i>Some ideas may include a hospital, a funeral fund, research for certain disease types, donations to a charity your loved one was partial to.</i>	

Information you may want to consider for the obituary

Full legal name and any nicknames you may want to include:	
City or town of residence:	
Listing of those “Survived by” <i>You may also wish to include close family members who have already passed away.</i>	
Employment or educational information / history:	
Special interests or hobbies or contributions to the community:	
Associations such as memberships in local or national organizations:	
Special affiliations, such as volunteering for an agency or group:	
What this person is most noted for or will be remembered for:	
Service and honors in the Military:	

Consider where you would like to publish the obituary

<p>The local or hometown newspapers: See the Information page at www.nextstepsforfamilies.com for a complete listing of newspapers.</p>	
<p>Newspaper where a significant number of relatives reside:</p>	
<p>The Internet: You may also want to check with the funeral home to see if they offer an on-line obituary. See the Resources page at our website for more information about on-line memorials and tributes.</p>	

Other considerations

<p>Consider asking family and friends to email a note to you of their favorite memories, photos or stories and combine them for part of the services or a memory book.</p>	
<p>You may want to consider a commemorative program for the service.</p>	
<p>It is customary to make a donation to the clergy and those assisting with the services.</p>	
<p>Reception: Check with the church to see if they offer a reception following the services, if not consider having a reception for family and friends.</p>	
<p>Use the <i>Visitors, Gifts and Donations form</i> to track information to be used later for sending acknowledgment or thank you cards.</p>	

Memorial Funds

If you wish to consider requesting that family and friends make a donation to a memorial fund, you can make arrangements with a bank or charity to establish the fund.

Bank or Charity	Contact Information

Travel arrangements for family and friends

Local Hotels:	Person needing hotel accommodations:

Additional Information:

- State law does require escorts for a funeral procession.
- Mortuaries, cemeteries and funeral directors may charge overtime for evening, weekend or holiday services.
- Embalming is not required by state law in most cases, however it may be necessary depending on the type of service selected by family, or because of certain disease.

*Use the **Family & Friends to Contact, Visitors, Gifts & Donations, Record of Contacts, Appointments** and **Beneficiary Information** pages of this booklet to assist you with organizing and tracking information. If you need additional copies of any of these pages, they can be printed individually from the **Resources page**.*

Beneficiary Information Form

Use this page to keep track of the contact information for each beneficiary or heir. One of the primary jobs of the personal representative is to keep track of the property and ensure that it goes to its' lawful beneficiary. It is a duty of the personal representative to communicate with beneficiaries and keep them informed regarding the status of the property. Keep contact information here to make it simple to access.

Beneficiary Contact Information	Gift for Beneficiary <i>Where does the gift come from –such as an insurance policy –where is it?</i>	Dates of Contact <i>Record dates of contact and type of information provided</i>	Date Gift Made:
Name: Address: City: State: Zip: Phone: email:			
Name: Address: City: State: Zip: Phone: email:			
Name: Address: City: State: Zip: Phone: email:			
NOTES:			

We at Next Steps for Families, LLC hope that you find the tools provided in this booklet to be useful in the days and months following the loss of your loved one. The information contained in this folder is only the beginning in the journey of keeping track of information associated with the tasks for the family and the personal representative of the estate.

Visit our website for additional information and resources following the loss of a loved one.

If you find that you would like help with the responsibilities of serving as the personal representative, caring for the property, processing possessions, or assessing the current situation for care services, contact Next Steps for Families, LLC to discuss how we can serve you.

Additional Thoughts:

- You and your family are in our thoughts and prayers as you face this difficult time.
- Ensure the needs of any dependents or survivors who may need assistance are immediately cared for.
- When making notification to friends and family, don't forget business associates. You may also want to check email accounts for other individuals who should be notified.
- Secure the property. A vacant home and the contents are vulnerable to theft.
- Locate the will and other important documents and keep them safe.
- Contact an experienced estate attorney as soon as feasible.
- Contact the Social Security Administration to notify them of the death and make arrangements for review of benefits for survivors.
- Consider leaving electricity and water services intact at this time. You will need the services for a while.
- Review the calendar and cancel services and appointments of the one who has passed away..
- Cancel newspapers and keep them from stacking up outside the home.
- Check to make sure a donation was made to the church or clergy for services provided with regards to the funeral. Be sure to document the sum of the donation as an expense for the funeral.
- Consider making a special donation in honor of your loved one.
- Be sure to have all property rightfully titled to the proper beneficiary as soon as approved by your attorney.
- Limit or discontinue driving a vehicle titled and insured in the name of the decedent unless you are also insured on the insurance policy.
- See the ***Resources page*** at www.nextstepsforfamilies.com for more information about grief, healing and support resources available to you.
- You can print additional copies of the pages of this booklet for your use at www.nextstepsforfamilies.com on the ***Resources page***.