Pre-Need Planning Checklist

There are several steps that must be considered when making Pre-planning arrangements. Please review the checklist of things to include in the planning process.

__ Meet with your family to discuss pre-planning burial arrangements, wills, insurance, document storage, veteran benefits, social security benefits, power of attorney, and an advanced healthcare directive

__ Meet with a Family Service Counselor at South-View Cemetery to discuss burial options and view the grounds

__ Select the garden/lot(s) or mausoleum that meets your personal and financial needs

__ Finalize Payment options

__ Meet with a funeral director to outline funeral service plans

__ Review all insurance policies, benefits, and beneficiaries

__ Make a list of all property and assets to prepare a Will and/or Trust Agreement

__ Select and confirm an Executor to oversee your estate at the time of your passing

__ Select a back-up Executor

__ Select a person to act as Power of Attorney to handle your property and business affairs while you are alive should you become incapacitated

__ Select and attorney to prepare your Will and Trust Agreement

__ Will Preparation

__ Prepare the Advanced Healthcare Directive

__ Plan a safe place for all original documents

__ Make copies of the documents

__ Give a copy of all documents to the Executor(s)

__ Direct them where to find the originals

__ Review all documents every three to five years or as changes occur in your life