



Making Funeral Arrangements Checklist

When you lose a loved one it can be overwhelming to think about all the details that need to be taken care of. Planning a funeral while grieving can be especially challenging, that's why we collected this checklist to help make things easier for you.

Checklist

Step 1 - Inform

- Obtain legal pronouncement of death from the attending physician, nurse or local law enforcement
- Make calls to notify friends and family of your loved one's passing

TIPS:

- For close contacts, it is best to break the news face-to-face
- If necessary, you can make a phone call from a private space where you won't be interrupted
- Prepare how you will deliver the news ahead of time - it's usually best to be direct rather than using euphemisms
- Confirm to make sure they understand what you are telling them
- Give them time to process before bringing up other topics (like the funeral)

Step 2 - Locate Arrangements

- Look for Pre-Arrangements and Funeral Funding

TIPS:

- Check their important paperwork for any written wishes
- Reach out to local funeral homes to inquire if they have a plan for them in their books
- Check their bank statements for one-time or regular payments to a funeral plan provider
- Ask their family members or friends if they had pre-arrangements
- If you learn of pre-paid funeral plan arrangements after the funeral has been carried out and paid for, contact the funeral plan provider to seek claim payment

- Determine how you will fund the funeral expenses if no prearrangements exist

TIPS:

- Once the bank is notified of their death, the deceased's accounts may become unavailable until processed by probate

- If financial strain is a concern, small amounts of public and/or private funding assistance may be available depending on your region and situation
- In Canada, you may qualify for The Canada Pension Plan [Government of Canada Death Benefit](#) or, if you already qualify for financial assistance, you can reach out to our municipal and provincial government for assistance with the casket, cemetery, or cremation fees
- In the United States, [Social Security Administration](#) can offer a small \$225 one-time death benefit, and [Veterans Affairs](#) offers a variety of funeral assistance programs. Some states may offer assistance through Medicaid, so reach out to your local administrator. Your funeral director can probably also recommend local options.
- Identify any burial benefits the deceased may be eligible for (ex. Veteran's benefits, military honors, religious groups, fraternal organizations)

Step 3 - Engage a funeral provider

TIPS:

- Research funeral directors
- Inquire about payment options
- Have them complete the death certificate if not already done

Step 4 - Select the service and date/time with funeral provider

- Choose the type of service your loved one would have wanted for their family and friends

TIPS:

- Accept any help offered to you by friends and loved ones and reach out for assistance when you need it.
- [Options are endless](#), and may include a traditional religious funeral, a non-religious funeral, a memorial service (no body present), a minimalist celebration (direct to cremation or burial with a simple memorial tribute), a celebration of life (joyous celebration), or a [green funeral](#) (environmentally conscious event and burial).
- If you're unsure of what kind of funeral ceremony they might have wanted, you can complete the [Quiz: How Do You Want To be Remembered?](#) from their perspective to explore the options that might suit them best.
- Consider your loved one's personality, values, culture, and religion when selecting the type of service
- You can choose a theme for the service, if you think it would be meaningful to your loved one



- Determine if embalming is appropriate considering their religious customs (for example, in the Jewish religion it is customary to avoid embalming)
 - TIPS:**
 - Most funeral homes require embalming after 24 hours if a body will be present for the funeral services
- Choose a location for the service
 - TIPS:**
 - This can be the funeral home, a church, a synagogue, etc. but remember this can be held anywhere and the options are as endless as a wedding location
- Select a date and time for the service
 - TIPS:**
 - Typically, the event takes place within 3–7 days
 - In some circumstances, such as both the Jewish and Hindu faith, it is customary to have a ceremony and bury the body within 24 hours of death
 - Most funerals last about an hour – but the length of the funeral is another detail that can match personal preference

Step 5 – Alongside your funeral director, consider how their remains should be handled

- Make transportation arrangements, if necessary
- Determine type of body disposition (ex. traditional burial, green burial, interment in a mausoleum, or cremation)
- Select container (casket or cremation urn/container)
- Select final resting place (could be a cemetery burial, place to scatter ashes)
 - TIPS:**
 - The funeral director or church can help you find space
 - Consider proximity to loved ones and deceased's favorite locations
- Write epitaph for tombstone/grave marker, if applicable

Step 6 – Alongside your funeral director, determine any pre-or-post service events

- Determine if there will be a wake, viewing, or visitation
 - TIPS:**
 - Traditional services include a reception or gathering
 - Post-service gatherings are typically a more casual opportunity to share memories together
 - At-home receptions can be either pot-luck style or catered
 - These events can be held almost anywhere – including a restaurant, family member's home, outdoor venue, event hall or anywhere meaningful. Many

funeral homes have space specifically for these events and will assist in the setup, catering, and clean-up

- The deceased's religion or culture may dictate whether these events are appropriate or the style and size of the event
- If holding a visitation event, determine if it should be open to only family or family and friends

Step 7 – Complete the obituary

- Write the obituary

TIPS:

- Your funeral director may offer assistance with writing the obituary
- Begin by announcing the death (summarize in a sentence)
- Provide a brief history of their life and accomplishments
- Include glimpses into their personality and what it was like to be around them
- List the surviving relatives (stick to close and immediate family)
- Provide the funeral details and viewings or events (if applicable)
- Have a second person proofread it

- Select a photo for the obituary, if any

- Post the obituary

TIPS:

- Most people prefer to post both online and in print in the local newspaper
- Each publication has specific submission guidelines and rates
- Submitting the obituary for online publication may be a service provided by your funeral home

Step 8 - Select personal touches

- Choose flower arrangements, if applicable

TIPS:

- Flower arrangements selected by the family are displayed by the casket/urn
- Common flowers for traditional funerals include roses, orchids, lilies, carnations and peace lilies
- White flowers are traditional Buddhist flower of mourning
- Avoid red for Chinese funerals as red is symbolic of happiness – instead choose a white or yellow chrysanthemum
- Flowers are typically not appropriate for Jewish or Islamic funerals

- Choose a charitable organization or a scholarship fund in lieu of flowers

- Select photos to be displayed at the service

- Choose any passages or poems to be read at the service



- Select any ceremony music
- Decide on any special décor that would be meaningful to loved ones
- Select clothing and jewelry for the deceased
- Obtain a funeral guestbook
- Choose burial items to accompany the remains
- Select who will perform a [eulogy](#) or speech
- Determine who will undertake Pallbearer duties

Next Steps:

Pat yourself on the back for completing this difficult task. Relax into your emotions and try and be present during the ceremony. Most importantly, provide yourself with some compassionate self-care during this difficult time.

After the funeral arrangements, it may be a good time to make your own pre-planned funeral arrangements if you haven't already, or update any plans that might be out-of-date so you can make things easier on your loved ones.