

celebrating your life

A helpful guide for you and your family



www.ballardsunderfuneral.com

We plan and prepare for most of the events during our lives, however, few of us prepare for the final event - that of our own funeral.

This booklet is a personal guide designed to record personal wishes and information required when a death occurs. The ultimate gift to those we leave behind is to make our wishes known, in writing and provide peace of mind for everyone involved.

We offer a wide choice of services which include in part: Traditional Funeral Services, Memorial Services, Celebration of Life Services, Graveside Services, Contemporary Services, Cremation Services and Infant Services.

For those who choose cremation, we are proud to serve our families, with an on-site crematory. The Reflections Crematory allows families a peace of mind, comfort and options, knowing their loved one will always remain in our care. We are the only on-site crematory in Scott County.

Pre-planning is simple and we, at Ballard-Sunder Funeral Homes would like to assist you and your family in assuring we celebrate your life the way you want. You can plan as little or as much as you desire by completing the necessary information to help lift the burden for your family.

Thank you for placing your trust in us.

Mark R. Ballard

Charles J. Sunder

Mark R. Ballard

Charles J. Sunder

Owners and Directors



www.ballardsunderfuneral.com

Personal Information

NAME

First _____ Middle _____ Last _____

Nickname: _____ Maiden Name: _____

CONTACT INFORMATION

Street: _____

City: _____ State: _____ Zip: _____

Home Phone _____

VITAL STATISTICS

Social Security Number: _____

Date of Birth: _____ Place of Birth: _____

Father's Full Name: _____

Mother's Full Maiden Name: _____

Education (highest grade completed) General: _____ College: _____

Main Occupation: _____ Business/Industry: _____

Physician Name: _____ Clinic: _____

MARRIAGE INFORMATION

Spouse Name: _____

Spouse Date of Birth: _____ Date of Death: (if applicable) _____

Marriage Date and Place: _____

ARMED FORCES (If Applicable)

Branch of Service: _____ Service Number: _____

Date Entered: _____ Date Discharged: _____

Do you want a flag? Folded Draped Given to: _____

Do you want military honors? yes no

MEMBERSHIPS (organizations, fraternal, clubs, businesses):

Additional Funeral Instructions

OTHER INSTRUCTIONS

Pallbearer or Urnbearer Names:

1. _____ 2. _____
3. _____ 4. _____
5. _____ 6. _____

Specific Clothing:

Specific Jewelry:

Glasses worn: ___ yes ___ no

Flower Arrangements:

Special Songs:

Special Readings/Verses:

Do you have a will or living trust? ___ Yes ___ No Location: _____

Name of Executor or Power of Attorney of Estate: _____

 Their phone number: _____

Do you have a living will? ___ Yes ___ No Location: _____

Attorney Name: _____

 Phone Number _____

Accountant Name: _____

 Phone Number _____

Financial Advisor Name: _____

 Phone Number _____

Financial Information

Bank Institution: _____ Phone: _____

Account Number: _____ Contact Name: _____

Bank Institution: _____ Phone: _____

Account Number: _____ Contact Name: _____

Bank Institution: _____ Phone: _____

Account Number: _____ Contact Name: _____

Retirement Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Retirement Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Retirement Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Annuities Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Annuities Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Brokerage Institution: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Insurances

Health Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Life Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Life Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Auto Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Disability Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Homeowner's Insurance Company: _____ Phone: _____

Policy Number: _____ Contact Name: _____

Notes

Important Information

SOCIAL SECURITY - If you are working and paying Social Security, some of the taxes you pay are applied toward survivor benefits. The amount of these benefits will be determined by Social Security.

We, at Ballard-Sunder Funeral Home, will notify Social Security of the passing. The family may need to contact Social Security Office at 1-800-772-1213 to determine benefits. The operator will need to know the deceased person's social security number, date of birth and survivor's information.

VETERANS ADMINISTRATION - If you are an honorably discharged veteran, your survivors may be eligible for a wide range of benefits, including burial costs. Information on a wide variety of topics may be obtained by calling 952-496-8176. For specific information about benefits, have your VA number available.

Some of the other benefits currently available to survivors of honorably discharged veterans may include a burial flag, a veteran's marker for the grave and, in some cases, burial allowances.



FEDERAL EMPLOYEES - Survivors of employees of the federal government may be eligible for a wide range of benefits including group life insurance, annuities and health insurance continuation. For more answers contact the Office of Personnel Management at (888)767-6738 or visit their website www.opm.gov.

WILLS AND LIVING TRUSTS - Everyone should have a will drawn up by an attorney. Such a legal document can prevent problems for the survivors while also ensuring that your personal wishes will be carried out. The making of a will and/or living trust gives you a degree of immortality because you can direct decisions concerning the management of your assets after your death. You should name an executor of your estate, someone you can trust to complete the necessary paperwork in a timely matter.

When there is no will and/or living trust, the estate is divided according to state law, in which case your possessions and assets might not be distributed as you would choose.

LIVING WILL - This is a legal document in which you state your wishes about certain kinds of medical treatment and life-prolonging procedures. The document takes effect if you can't communicate your own healthcare decisions. Laws vary from state to state. It is recommended to have it reviewed by your doctor for legal questions and making your wishes known.

POWER OF ATTORNEY - The power of attorney is a written document authorizing another person to act on your behalf. It can be limited to certain issues or be a general attorney-in-fact. You should discuss this with the person you've chosen to make sure he or she understands your wishes and agrees to take on the responsibility.

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PROBATE - Probate is the process of settling your estate and the transfer of your property to heirs or beneficiaries under the supervision of a probate court. Probate can be avoided in many cases by setting up a living trust.

LIFE INSURANCE - Life insurance cannot eliminate the emotion loss a family feels after the death of a loved one, but it may help to eliminate the financial hardship for the family. This contract is an agreement of the insurance company to pay money to a designated beneficiary upon the death of the policyholder.

THINGS TO REMEMBER

Should death occur, contact us immediately at our main number, 952-492-2818. We will assist your family in making necessary arrangements.

Should death occur while away from home – in any other city, state or country – contact us immediately. We will arrange for transportation of the deceased and handle all financial and other details for you.

Remember our phones are answered 24 hours a day and 7 days a week.

We *celebrate* each life with honor, care and compassion.



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