

Funeral Pre-Planning Worksheet

Recording Wishes and Comparing Providers, Calmly and Early

Pre-planning removes impossible decisions from an impossibly hard week. Record the wishes first; decide later whether to prepay anything.

Part 1: The wishes

Decision	Preference / notes
Burial or cremation (or donation to science)	
Service type: religious / celebration of life / graveside / none	
Where (venue, faith community, funeral home)	
Who should officiate or speak	
Music, readings, or traditions that matter	
Cemetery or resting place (own plot already? where is the deed?)	
Obituary: yes / no, and anything it must say	
What NOT to spend money on (say it now, in writing)	

Part 2: Questions for any funeral home

Question	Home 1	Home 2
Can I have the full itemized price list? (You are entitled to it)		
Which items are required by law, and which are optional?		
Basic cremation / burial package price, all in		
If prepaying: where is the money held (trust or insurance), and is it protected?		
Is a prepaid plan transferable if we move? Refundable if we cancel?		

Question	Home 1	Home 2
Which prices are guaranteed by prepaying, and which can still rise?		
Is the home independently owned or part of a chain?		

Part 3: Where the paperwork lives

Item	Location
This worksheet	
Prepaid contract (if any) and receipts	
Cemetery deed (if any)	
Will and executor's name	
List of people to notify	

In Ontario, funeral providers are licensed by the Bereavement Authority of Ontario (thebao.ca); check the licence and complaint history before prepaying anything.