

License FD-2304 25431 Trabuco Road #3 Lake Forest, CA 92630 949-445-1600

SEC	TION 1: BASIC INFORMATION			Date Prepa	ired
Pri	imary Personal Information				
*	Personal Information				
	Name (Last)	(First)		(Middle)	
	Suffix (e.g., Sr., Jr.) Sex (M / F	=)	Soc	ial Security No	
	Citizenship (country)		Ancestry		
	Ethnic Group/Race(e.g., African-American, As			on	
*	Residence	idii, Cducdsia	an, rispanic, etc.)		
	Street Address		Apt./Unit #	Residential Facility Name	
	City	County		State	
	Zip Country				
*	Birth Information				
	Date of Birth	City of Birtl	h		
	County	State		Country	
*	Emergency Information				
	Person to Contact			Phone	
	Physician			Phone	
No	otifications				
*	Persons to be Notified				
	Name	Address			Phone
	Name	Address			Phone
	Name	Address			Phone
	Name	Address			Phone
	Name	Address			Phone
	Name	Address			Phone



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### **PRE-PLANNING GUIDE**

#### Notifications, continued

.*.	Contacts	fa.   a.a.	I B./ a.+ a.v.a

	Person Responsible for Funeral Arra	ngements		
	Name		Phor	ne
	Address	City	State	Zip
	Attorney			
	Name	Firm		Phone
	Address	City	State	Zip
	Executor of Estate			
	Firm Name			Phone
	Address	City	State	Zip
*	<u>Obituary</u>			
	Newspaper(s)			
	Other			
Loc	cation of Important Informa	rtion		
den	ntify where the following important d	ocuments are located:		
	Will			
	Birth Certificate			
	Marriage License			
		te		
		es		
		ome, autos, etc)		
	Bank Account Passbooks			
	Income Tax Returns			
		irial Property		
		cial Information		
	Location of Safe Deposit Box			
	Figure and I health at a co		DI.	ana
	rillancial institution _		Pr	one

\_\_\_\_\_ State \_\_\_\_\_ Zip \_



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Method of Final Disposition							
Choose method of final disposition:							
Whole body burial or entombment							
Cremation							
Specify disposition of ashes:							
Burial or entombment at cemetery Scattering at cemetery							
Deliver to survivors Other							
Donation to medical science							
Specify Recipient Organization, if one has been selected:  Organization  Address							
City/State/Zip Telephone							
Other: Specify							
Also specify the Service Provider, if one has been selected:  Organization  Address  City/State/Zip  Telephone							
SECTION 2: DETAILED FUNERAL SERVICE INFORMATION							
Type of Funeral Service Plan							
Choose a type of Funeral Service Plan:							
Traditional Funeral with Visitation and Burial							
Graveside Service with Visitation							
Chapel Service without Visitation							
Graveside Service without Visitation							
Direct (the deceased is buried, cremated or donated to medical science without any funeral services)							



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Methods of Care					
Select the following services regarding preparation and care:					
Do you want to have an embalming performed? (Y/N) (this may be required)					
Do you want a DNA sample taken? (Y/N)					
Do you want an autopsy performed? (Y/N) (this may be required)					
Methods of Presentation					
Casket Presentation Selections					
(Make these selections if a Traditional or Traditional Plus Service Plan has been chosen)					
Select how you prefer the casket presented at the visitation(s): Open Closed					
Select how you prefer the casket presented at the funeral: Open Closed					
Do you want only a private family viewing? (Y/N)					
Note: the deceased will be dressed and cosmetics will be applied if you have chosen to have a private family viewing or select to have an open casket presentation. If you do not wish to have the deceased dressed and cosmeticized for viewings, please explain below how you would like the deceased to be presented:					
* Clothing Selections					
New					
Existing					
Jewelry					
Clothing Selections to be made by:					
Visitation Coloctions					
Visitation Selections					
(Make these selections if a Traditional Funeral or Graveside Service with Visitation Plan has been chosen)					
Choose a location for the visitation:					
Funeral Home					
Church, temple, synagogue or other religious sanctuary					
Other Facility (describe)(Traditional Funeral Plan Only)					



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Visi	itation Sele	ctions, continue	d						
	Indicate name, address and telephone of chosen location:								
	Name								
	Address								
	City			State		Zip			
	Teleph	one		Fax		_			
Tr	ansportati	ion Selections							
(M	ake these sele	ections if a Tradition	nal or Traditional P	lus or Graveside Service Plan h	as been chosen)				
	Choose me	ethod of transportin	g the deceased bet	ween service locations and to t	he cemetery				
	F	uneral Coach or Hea	irse						
	F	uneral Van (more ed	conomical)						
	Choose me	ethod of transportin	g family members t	petween service locations and t	to the cemetery				
		imousine	# of people	_					
	v	/an	# of people						
	F	Family will provide t	ransportation						
	Escort Nee	eded? (Y/N)	Instructions	S					
Fu	ineral / Me	emorial Service	Selections						
				Traditional Plus Service Plan h	as been chosen. If th	nere will be more than one			
ser	vice, make ad	lditional copies of tl	nis section and com	plete it for each service)					
*	Service Sele	ections .							
	Indicate typ	e of Service:							
		Funeral Service		Memorial Service					
	Choose a lo	cation for the funera	al service:						
		Funeral Home							
		Church, temple,	synagogue, mosque	e or other religious sanctuary					
		Other Facility (sp	ecify)						



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#### Funeral / Memorial Service Selections, continued

	Indicate name, address and telephone of	f chosen location:				
	Name		Address	i		
	City		State	Zip		
	Telephone		Fax			
*	Clergy Presiding					
	Name	Affiliation _			Phone	
	Name	Affiliation _			Phone	
	Name	Affiliation _			Phone	
*	<u>Palibearers</u>					
	(Make these selections if a Traditional	or Traditional Plus or	Graveside Service P	lan has been selecte	ed)	
						tive, Honorary Alternate?
	Name		Phone			
	Name	<del></del>	Phone			
	Name		Phone			
	Name		Phone			
	Name	<del></del>	Phone			
	Name	<del></del>	Phone			
	Name	<del></del>	Phone			
	Name		Phone			
*	<u>Music</u>					
	Title		Artist			
	Title		Artist			
	Title		Artist			
	Title		Artist			
	Title		Artist			



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#### Funeral / Memorial Service Selections, continued

*	<u>Performers</u>					
	Organist	Name	 		Phone	
	Vocalist	Name	 		Phone	
		Name	 		Phone	
		Name	 		Phone	
		Name	 		Phone	
*	Readings					
	Title		 Source/Reference _			
	To be read by:		 	Phone _		
	Title		 Source/Reference _			
	To be read by:		 <del></del>	Phone _		
	Title		 Source/Reference _			
	To be read by:		 <del></del>	Phone _		
	Title		 Source/Reference _			
	To be read by:		 	Phone _		
*	<u>Flowers</u>					
	Florist			Phone		
	Floral Selection #1					
	Floral Selection #2					
	Floral Selection #3					
	Floral Selection #4					



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Funeral / Memorial Service Selections, continued

Memorial displays		
Description		
Special Service Components		
(Complete this section to provide instructions the rites of fraternal organizations like Mason		
Description		
referred Tribute Type		
☐ Floral		
Masses		
Charitable		
Preferred Charity #1:	Telenh	one
	City/State/Zip:	
Preferred Charity #2:	Teleph	one
Address:	City/State/Zip:	
emetery Information		
omplete this section if a burial or scattering at th	e cemetery has been chosen)	
Cemetery Name	Address	
City	State	Zip
Telephone	Fax	
Property Identification:		



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#### **PRE-PLANNING GUIDE**

#### **SECTION 3: DETAILED FUNERAL MERCHANDISE INFORMATION**

Fu	neral I	Merchandise			
*	<u>Casket</u>	<u> </u>			
	Manuf	facturer	Model #	Model Name	
	Identif	y type of casket:			
		Wood	Specify (e.g., b	irch, cherry, mahogany, maple, oak, μ	oine, poplar, walnut, etc.)
		Precious Metal	Specify (bron	ze or copper) Sealed? (Y/N)	_
		Steel	Specify (16, 18 or 20 ga	auge) Stainless? (Y/N)	Sealed? (Y/N)
		Cloth covered			
		Other	Specify		
	Identif	y lid style:			
		Half	Couch (2 piece)	ull Couch (1 piece)	
	Identif	y interior features:			
	Materi	ial	(e.g., crepe, linen, velour, v	elvet) Color	
	Style _		(e.g., shirred, tailored, tufted)		
	Specia	l Features			
*	<u>Outer</u>	Burial Container			
	Manuf	facturer	Model #	Model Name	
	Identif	y type of outer buria	Il container:		
		Grave Box or Grav	e Liner Specify	(e.g., concrete or wood)	
		Vault	Specify	(e.g., bronze, copper, concrete, p	lastic, wood, composite)
		Lawn Crypt	Specify	(e.g., concrete or wood)	
	Specia	l Features			



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#### Funeral Merchandise, continued

Cremation Urn				
Manufacturer		Model #	Model Name	
Material		(e.g., bronze, ceramic, r	narble, wood)	
Grave Marker				
Manufacturer		Model #	Model Name	
Identify type of a	grave marker:			
Grave N	Marker (flush to the g	round) Specify	(e.g., bronze, granite, marbl	e)
Monum	nent (upright)	Specify	(e.g., bronze, granite, mark	ole)
Lawn Cr	rypt	Specify	(e.g., concrete or wood)	
Engraving				
Stationery Production	<del></del>		Style	Quantity
Prayer Cards:	Manufacturer <sub>-</sub>		Style	Quantity
	Verse to print o	on Prayer Cards:		
Memorial Folder	rs: Manufacturer _		Style	Quantity
	Verse to print o	on Memorial Folders		
Prayer Books:	Manufacturer _		Style	Quantity
Acknowledgeme	ent Cards: Manufacti	urer	Style	Quantity
	Manufacti	urer	Style	Quantity



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#### **SECTION 4: ADDITIONAL PERSONAL INFORMATION**

(The following information, to the extent it is completed, will be used for Obituary purposes and will provide a genealogy record for the family of the deceased)

Marital Information	<u>rital Information</u>						
Marital Status (single / marr	ried / widowed / divorced)						
<u>Spouse</u>							
Name (Last)	(First)	(Middle)					
Suffix (e.g., Sr., Jr.)	Sex (M / F)	Social Security No					
Living? (Y/N)	Birth Date	Date of Death					
Address	City	State	Zip				
Country	Telephone	E-Mail					
Marriage Data							
Date of Marriage	City	State	Country				
<u>Parents</u>							
<u>Father Data</u>							
Name (Last)	(First)	(Middle)					
Suffix (e.g., Sr., Jr.)	Living? (Y/N)	Date of Death					
Birth Date	Birth Place						
Married (Y/N)	Spouse Name (if no	ot Mother)					
Address	City	State	Zip				
Country	Telephone	E-Mail					
Mother Data							
Name (Last)	(First)	(Middle)					
Maiden Name	Living? (Y/N)	Date of Death					
Birth Date	Birth Place						
Married (Y/N)	Spouse Name	e (if not Father)					
Address	City	State	Zip				
Country	Telephone	E-Ma	il				



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#### **Additional Personal Information, continued**

<u>Children</u>				
Child #1				
Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
Living? (Y/N)	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. of Children	
Address	City		State Zip	
Country	Telephone			
E-Mail				
Child #2				
Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
Living? (Y/N)	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. of Children	
Address	City	<del></del>	State Zip	
Country	Telephone			
E-Mail				
Child #3				
Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
Living? (Y/N)	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. of Children	
Address	City		State Zip	
Country	Telephone			
F-Mail				



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**Additional Personal Information, continued** 

\*

Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. o	f Children
Address	City		State	Zip
	Telephone			
E-Mail				
other/Sister #2				
Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
Living? (Y/N)	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. o	f Children
Address	City		State	Zip
Country	Telephone			
E-Mail				
other/Sister #3				
Name (Last)	(First)		_(Middle)	
Suffix (e.g., Sr., Jr.)	Male/Female (M/F)			
Living? (Y/N)	Birth Date	Date of Death		
Married? (Y/N)	Spouse Name		No. o	f Children
Address	City	<del></del>	State	Zip
Country	Telephone			
E Mail				



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#### Additional Personal Information, continued

*	History of Residences		
	City / State / Country		No. of Years
	City / State / Country		No. of Years
	City / State / Country		No. of Years
	City / State / Country		No. of Years
*	<u>Education</u>		
	Elementary School	City/State	
	High School	City/State	
	Year Graduated		
	Undergraduate College	City/State	
	Undergraduate Degree	Year	
	Graduate College	City/State	
	Graduate Degree	Year	
*	Military Record		
	Branch of Service	Years Served From	То
	Rank	Service Number	
	Wars Served	Decorations	
*	Work History		
	Retired? (Y/N)	Year Retired	
	Principle occupation		No. of Years
	Industries		
	Secondary occupation		No. of Years
	Industries		
	Employer #1	City/Sta	ite
	Years From	То	
	Employer #2	City/Sta	nte



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### **PRE-PLANNING GUIDE**

#### Additional Personal Information, continued

	Employer #3		City/State
	Years From	То	
	Employer #4		City/State
	Years From	То	
*	Religious Institutions		
	Institution #1		
	Institution #2		<del></del>
*	Memberships and Public Offices Held		
	Organization #1		_Position(s) Held
	Organization #2		Position(s) Held
	Organization #3		Position(s) Held
	Organization #4		Position(s) Held
	Organization #5		Position(s) Held
*	Notable Accomplishments		
	Accomplishment #1		
	Accomplishment #2		
	Accomplishment #3		
	Accomplishment #4		