



FAREWELLING CHECKLIST: THE FAREWELLING 5

ADVANCED PLANNING FOR SOMEONE ELSE



If you're helping to plan a future farewelling for a loved one or friend, first off, you're amazing! Next, use this checklist to stay organized and track your progress. We've arranged tasks into five sections to streamline the process, and you can click the links within to read more about any topic. Hint: Don't try to do this all in one sitting--start with whatever is easiest for you (and them!), and take it from there. You can always make changes and updates. Just get started!

You may want to take a look through the pages here before starting so you have the general idea of how it's laid out. Also, if you need more advice or guidance or even info on local providers, visit the myfarewelling.com site for all of it.

1. WELL CONSIDERED: IMPORTANT DECISIONS

This section deals with some choices that will guide the rest of the process. The points may spark a deep discussion or require more thought. If you're not sure where to begin, we suggest organizing key healthcare paperwork first.

- Read about and fill out key healthcare-related paperwork link to be sure that their wishes regarding medical treatment are known and will be carried out.
 - Living Will
 - POLST
 - Power of Attorney/Healthcare Proxy (How to Choose A Healthcare Proxy)
 - Durable Power of Attorney
 - DNR/DNI Order
- Confirm whether organ donation (or whole body donation) is something they want
 - Gather or complete paperwork to confirm this
- Review any existing funeral arrangements or plans so you know where to begin now
- Ask if any final wishes have been shared in any format
- Plan for guardianship of any children or dependents
- Plan for the care of any pets (include veterinarian contact info)
- Create or update their will online, or work with a lawyer

2. WELL DOCUMENTED: ESSENTIAL RECORDS

Depending on the situation, you'll need some combination of the below docs, so this list should be helpful as you plan. It can be good to gather documents and copies of IDs, etc. into one central file for safekeeping. We suggest keeping them with your completed Farewelling Worksheet.

- Farewelling File/Funeral Plans.
- Identification Documents (Drivers License, Passport, Birth Certificate)
- Social Security Card
- Marriage Certificate and/or Divorce Record
- Last Will and Testament
- Statements for Bank, Retirement, Investment, Credit and Loan Accounts
- Passwords and Pin Codes to all Accounts
- Deeds or Proof of Ownership for Home, Car, etc.
- Business-related Documents
- Insurance Policies
- Key Contact Info (see the Farewelling 3: Well Organized section of this checklist)

3. WELL ORGANIZED: THE PRACTICALITIES

This section will help you think about important contact information so you can gather it all in one place. You can fill out the Farewelling Worksheet that follows, buy a small address book, or make a shared Google sheet or Dropbox file—whatever works for you.

- Gather contact information
 - Immediate and extended family
 - Loved ones and friends
 - Workplace colleagues
 - Landlord
 - Personal and/or business attorney
 - Primary care doctor and any important specialists
 - Member organizations (military, volunteer, civic, religious, etc.)

- If you are planning for a veteran, review benefits.

4. WELL PLANNED: THE SERVICE AND CELEBRATION

Farewelling is all about celebrating a beautiful life, beautifully, and that's what this section is for. A funeral is often made up of two or more events—a service and a gathering of some sort. Whatever the event format, the idea is to create something that reflects the values, preferences and, yes, even the style of the individual. *Note: some folks are shy about this part, while others already have a clear vision of what they want. But if you open the discussion softly, you'll discover so much about them, and that is a really cool thing.*

- Discuss burial, cremation, or other alternatives
- Explore whether they'd like to pre-pay for their funeral arrangements through funeral insurance, or if they'd like to set aside money in a savings account
- Confirm their preferred funeral service format (religious, non-traditional, eco-friendly, etc.)
- Confirm any preferred funeral celebrant/religious leader and note contact info
- Review and select readings, quotes, or other inspirational words for the service
- Write down names and contacts of any preferred speakers and format for speeches
- Discuss any floral and/or decor preferences for the service and/or celebration
- Select music for any desired moments/elements
- Ask whether there's any preference for a program or prayer card for the service
- Discuss their thoughts on clothing and accessories for their service
- Note any preferred venue for a celebration/gathering
- Discuss any special requests/favorites for food and drink for each event
- Add personal details to the celebration (choose favorite photos for slideshow, record a video of little-known facts or stories, discuss sweet or funny or traditional touches)

5. WELL REMEMBERED: LEGACY MATTERS

In our increasingly digital world, people are thinking more about how they want their social media accounts to live on--or not--beyond them. And some folks want a say in their own obituary, for example, or to support certain charities. Whatever they decide, it's still good to address these elements to make sure any wishes are clear.

- ❑ Discuss their social media and digital account preferences.
- ❑ Confirm if there are any charitable organizations they'd like to support
- ❑ Gather preferred info for an obituary/tribute



Farewelling^{*}

Celebrating a beautiful life, beautifully

www.myfarewelling.com

THE PERSONAL

Farewelling[★]



FOR THE FAREWELLING OF

FAREWELLING CHECKLIST: THE WORKSHEET

Okay, you've seen the checklist. Now here's a chance—and a simple, streamlined place—for you to follow it through and help your friend or loved one record their wishes and important information. You could always scan this document and store it digitally, or you could just put it in a nice file with copies of the records listed in the Well Documented section, then keep it in a safe place (and tell key people where it is just in case).

Take it easy when completing the worksheet--you don't have to do it all at once. It follows the same format as the Checklist above, so just skim down and fill something in as the spirit moves you. You can always come back to sections you skip, after more thought, discussion or research. What's important is to get started. Also, if you find you need more lines for contacts or instructions, feel free to make copies of these pages or add in your own pages with a note to the reader so they'll know where to find things.



I created/updated this worksheet on: _____

I've chosen an amazing person to carry out my wishes. Here's their contact info:

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

If for any reason they can't do it, here's another amazing person:

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

FAREWELLING CHECKLIST: THE WORKSHEET

1. WELL CONSIDERED: KEY DECISIONS

I have a:

- Living Will
- POLST
- Power of Attorney (Healthcare Proxy)
- Durable Power of Attorney
- DNR/DNI Order

My paperwork is located _____

I am an Organ Donor: YES / NO

My paperwork is located _____

I'm donating my body to the following cause:

- You'll find my paperwork attached to this file
- My paperwork is located _____

I have a last will and testament: YES / NO

It was prepared (date) _____

You'll find it _____

I don't have an official will, but you can find my final wishes:

- In this document
- Elsewhere _____

FAREWELLING CHECKLIST: THE WORKSHEET

MY LIFE INSURANCE

- I don't have life insurance
 - I do have life insurance and you can find a copy of my policy attached to this file
 - I've stored my life insurance policy and you can find it
-

Insurance Company Name _____

Policy Number _____

Contact Phone/Email _____

Beneficiary _____

MY OTHER INSURANCE

I don't have other insurance

- I do have other insurance for _____ and you can find a copy of my policy attached to this file
 - I've stored my insurance policy and you can find it
-

Insurance Company Name _____

Policy Number _____

Contact Phone/Email _____

Beneficiary _____

FAREWELLING CHECKLIST: THE WORKSHEET

2. WELL ORGANIZED: MY CONTACTS

Here are some important people in my life. I'm including their contact info to make it easier to get in touch with them.

- I've filled out the list below for you.
- I've typed up the contacts and printed out a paper copy of the list, which is attached to this Farewelling File.
- I've made a digital list of contacts and you'll find it in the following location

PEOPLE I'D LIKE NOTIFIED RIGHT AWAY

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

OTHER LOVED ONES AND FRIENDS

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

WORKPLACE CONTACTS/OTHER IMPORTANT COLLEAGUES

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

LAWYER(S) / LEGAL ADVISOR(S)

NAME	ROLE	EMAIL	PHONE
------	------	-------	-------

NOTES: _____

NAME	ROLE	EMAIL	PHONE
------	------	-------	-------

NOTES: _____

NAME	ROLE	EMAIL	PHONE
------	------	-------	-------

NOTES: _____

ACCOUNTANT(S) AND/OR FINANCIAL ADVISORS

NAME	ROLE	EMAIL	PHONE
------	------	-------	-------

NOTES: _____

NAME	ROLE	EMAIL	PHONE
------	------	-------	-------

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

LANDLORD

NAME	EMAIL	PHONE
------	-------	-------

NOTES: _____

There ARE / ARE NOT other people who have extra keys to my place

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

MEMBER ORGANIZATIONS (military, volunteer, civic, religious, etc.)

NAME OF ORGANIZATION	CONTACT
----------------------	---------

EMAIL	PHONE	MEMBER NUMBER	ID
-------	-------	---------------	----

NOTES: _____

NAME OF ORGANIZATION	CONTACT
----------------------	---------

EMAIL	PHONE	MEMBER NUMBER	ID
-------	-------	---------------	----

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

OTHER PEOPLE I'D LIKE TO NOTIFY

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

NAME	RELATIONSHIP	EMAIL	PHONE
------	--------------	-------	-------

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

3. WELL DOCUMENTED: MY KEY RECORDS AND PAPERS

Here in my Farewelling File, you'll find copies of the following docs and info

- Farewelling File/Funeral Plans (including info on any burial plots, funeral savings accounts or pre-paid arrangements)

NOTES: _____

- Driver's License
- Passport
- Birth Certificate
- Social Security Card
- Marriage Certificate and/or Divorce Record(s)

NOTES: _____

To make it easier to organize my accounts, I'm including the following here for you, along with notes about what I'd like you to do.

BANK STATEMENTS/ACCOUNT NUMBERS

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

RETIREMENT ACCOUNT(S)

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

INVESTMENT ACCOUNT(S)

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

CREDIT ACCOUNT(S)

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

LOAN ACCOUNT(S)

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

Name of Bank/ Institution _____

Account Number _____

Type of Account _____

Contact Info _____

Beneficiary Name/Contact _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

DIGITAL STUFF

I'm including some important log-in information here for my digital accounts.

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

PET-RELATED INFORMATION

Here are some instructions related to my sweet pets and their future care.

Pet Name _____

Type of Pet _____

Vet Contact Info _____

NOTES: _____

Pet Name _____

Type of Pet _____

Vet Contact Info _____

NOTES: _____

Pet Name _____

Type of Pet _____

Vet Contact Info _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

MY BILLS

If you need to contact utilities, etc., here's my info

Cable Company _____

Account Number _____

Password _____

Phone Company _____

Account Number _____

Password _____

Internet Company _____

Account Number _____

Password _____

Gas/ Electric Company _____

Account Number _____

Password _____

Other _____

Account Number _____

Password _____

4. WELL REMEMBERED: MY STUFF AND THINGS I'M LEAVING BEHIND

There are some objects and items of value that are not noted in any last will or testament, but I'd like to note them here, along with instructions about what to do with them.

Item _____

NOTES: _____

Item _____

NOTES: _____

Item _____

NOTES: _____

Item _____

NOTES: _____

Item _____

NOTES: _____

Item _____

NOTES: _____

Item _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

MY SOCIAL MEDIA LEGACY

Here's what I'd like you to do with each of my social media accounts after I'm gone.

Facebook

Username _____ Password _____

NOTES: _____

Twitter

Username _____ Password _____

NOTES: _____

Instagram

Username _____ Password _____

NOTES: _____

Other _____

Username _____ Password _____

NOTES: _____

Other _____

Username _____ Password _____

NOTES: _____

FAREWELLING CHECKLIST: THE WORKSHEET

OTHER DIGITAL STUFF

I'm including some important log-in information here for my digital accounts, my personal or business website, or other online accounts I'd like you to resolve.

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

Account/Website _____

User Name _____

Password or Pin _____

NOTES: _____

5. WELL PLANNED: MY WISHES FOR A FUNERAL SERVICE AND/OR CELEBRATION

I wanted to share some wishes here, so that everyone will be on the same page.

I've already pre-arranged my funeral with a funeral provider: YES / NO

I've set aside money for my funeral expenses: YES / NO

The funeral provider I'd like you to use is:

Name / Contact _____

You will find my funeral wishes:

- You'll find my funeral wishes in my will.
- You'll find my funeral wishes described below.
- You'll find my funeral wishes _____

I want a funeral that is as eco-friendly as possible: YES / NO

Here's what I'd like done with my body after I die:

Here's why I've made that choice:

FAREWELLING CHECKLIST: THE WORKSHEET

If there's any confusion or issue, here's what's most important to me about what is done with my body/ashes:

Here's what I don't want:

Words I'd use to describe my ideal funeral service:

Traditional	Religious	Intimate
Eco-friendly	Non-religious	Artistic
Alternative	Spiritual	Upbeat
Understated	Quirky	Irreverent
Family Only	Natural	Whatever

Other: _____

Here's what's most important to me about my funeral service:

FAREWELLING CHECKLIST: THE WORKSHEET

Here's what I really don't want, just in case you're unsure:

I'd like to recommend a style of dress or color palette for my service:

Here's why I'd like that kind of mood/color palette:

FAREWELLING CHECKLIST: THE WORKSHEET

ELEMENTS I'D LIKE INCLUDED IN MY FUNERAL SERVICE

A viewing

Here's what I'd like to wear, and any accessories I'd like:

Readings

1. _____
2. _____
3. _____

Other notes about my service (details of music, readings, etc. follow on the next pages):

FAREWELLING CHECKLIST: THE WORKSHEET

A CELEBRATION OF HOW MUCH LIFE MEANT TO ME

Separate from the service itself, if there is another farewelling celebration for me, here are some words I'd use to describe how I'd hope it would feel

Intimate	Grand	Quiet	Raucous	Whatever you like
Elegant	Hike	Bohemian	Modern	Dance Party
Eco-friendly	Foodie	Chic	Natural	Unexpected
Vintage-style	Brunch	Lunch	Cocktails	Dinner

Other words that describe the kind of farewelling I'd like:

If there is music playing at a celebration in my honor separate from the service, here's what kind of music I'd like:

The reason I want this kind of music is: _____

I have specific requests for music at particular moments in my service or celebration:

Moment _____ Mood/Song _____

Moment _____ Mood/Song _____

Moment _____ Mood/Song _____

Or you can find my farewelling playlist: _____

FAREWELLING CHECKLIST: THE WORKSHEET

If you'll serve food and drinks at the celebration, some of my favorites are:

Here are some notes on decor, flowers or other elements and details that I love:

I do have some photos I really like. If you want to use them for anything, you can find them:

I have a bit more to say about the celebration of my life. Here goes:

FAREWELLING CHECKLIST: THE WORKSHEET

WORDS THAT MATTER: MY EULOGY AND OBITUARY

Here's what I'd like you to know about my eulogy and/or obituary:

Fun facts about me that might be nice to share:

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

Just so you have some context, here's what I *don't* want for my eulogy/obituary:

FAREWELLING CHECKLIST: THE WORKSHEET

If I had to write my own epitaph, here's what it might say:

One year after I'm gone, I'd love it if you'd celebrate my memory by doing this:

A NOTE FROM ME TO YOU:

FAREWELLING CHECKLIST: THE WORKSHEET

KIND OF RANDOM BUT POSSIBLY IMPORTANT OTHER DETAILS

I'm including details here just on the things that apply to me.

I have:

A Vacation home _____

A Rental Timeshare _____

A Paid Storage Space _____

Items or Cash Hidden Somewhere _____

Other _____

Other _____

Other _____

THANK YOU FOR TAKING CARE OF THIS FOR ME.



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Celebrating a beautiful life, beautifully

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