



A PLANNING GUIDE FOR A CATHOLIC FUNERAL

Prepared by

southjerseycatholiccemeteries.org

Table of Contents

4 The Catholic Teaching on Death & Burial

Discusses the church's teaching on the proper handling of remains, including the importance of a Catholic funeral and a Catholic cemetery.

6 Catholic Funeral Rite Consists of Three Parts

Describes the three rites of a Catholic funeral, the Vigil, the funeral Mass, the Rite of Committal, including the proper handling of cremated remains.

10 When Death is Imminent or Has Occurred

Simple, easy-to-follow checklist covering what to do immediately, a few days and a couple of weeks following the death of a loved one.

12 Funeral Planning

Easy to fill-in guide identifying your wishes at the time of death. It covers your preference for funeral home, funeral choices, and funeral services.

17 Personal & Family History

In one location, provides background and historical information for your loved ones to reference, including medical history.

21 Legal Information

Explains the importance of creating a Last Will & Testament and Advance Health Care Directive (AHCD), and provides the location of important documents.

22 Financial Information

Easy to fill-in guide listing assets such as insurance, stocks, real estate, pension/401k/403b as well as a listing of liabilities, such as mortgages, loans, and credit cards.

27 Social Media & Additional Considerations

A listing of your social media accounts and instructions on handling the accounts upon your death. Also includes any additional considerations not covered earlier.



How to Use This Guide:

Handling funeral arrangements and executing the last will & testament of a loved one is not something many people have experience completing. This booklet is designed to provide peace of mind for the preparer, and to help those who will be responsible for planning the funeral and executing the will of the deceased.

Reading and filling out this booklet will make life easier for your loved ones during a time of great sadness and difficulty. It will help eliminate any guesswork by providing your wishes regarding your funeral, a record of personal history, as well as providing important financial and legal information in one easy and simple place. As you fill out this guide, you may make it simple, or you may plan each detail. It's up to you. You decide.

Just as you update your will after life changes such as, marriage or the birth of children, we suggest you treat this guide in the same way by reviewing it periodically and updating it as often as needed. By doing this, you will provide valuable, current and accurate information to many questions that will need to be answered at a time of great stress and anguish for your loved ones.

If you have not done any estate planning such as a last will, we suggest you consider contacting a lawyer to help you with this. Also, speaking with an accountant or financial advisor to understand inheritance and estate tax laws and the use of funds once a person dies, is invaluable information that when planned ahead of a death can help to alleviate unnecessary stress for your loved ones.

The material contained in this brochure is not intended to constitute legal or financial advice, instead, all information and content are for general informational purposes only. We encourage you to seek legal and financial advice.



The Catholic Teaching on Death & Burial

The Christian faith embodies many mysteries. These are beliefs that we accept as truth on faith because they have been revealed to us by God. These mysteries are central to our faith, but they are not always easy for individuals to explain, and they can be difficult to comprehend. When the Catholic Church explains the Paschal Mystery, it is referring to God's plan of salvation which was ultimately fulfilled through three events in Christ's life, including His Passion (death), Resurrection, and Ascension.

All the dead will rise when Jesus comes again to judge the living and the dead. In the final resurrection, our bodies will be transformed, though we do not know precisely how. The manner of our resurrection exceeds our understanding and imagination and is accessible only through our faith. The Church earnestly recommends the pious custom of

burying the bodies of the dead, where the body lies in waiting for the resurrection.

The salvation of souls is needed because of Original Sin. *"God did not make death, and He does not delight in the death of the living... It was through the devil's envy that death entered the world."* (Wisdom 1:13; 2:24)

In order to wash away the sin, God sent His only Son so that we may have eternal life. *"For God so loved the world that He gave His only Son, so that everyone who believes in Him might not perish but might have eternal life."* (John 3:16) Christ, *"the first-born from the dead"* (Col 1:18), *is the principle of our own resurrection, even now by the justification of our souls* (cf. Rom 6:4), *and one day by the new life He will impart to our bodies* (cf. Rom 8:11). (CCC, no. 658)

As Catholics, we are taught to honor and respect the human body through all stages of life including death. Burying the dead is a Corporal Work of Mercy. The body of the deceased should be treated with respect and reverence, and must be placed on sacred grounds awaiting the resurrection, regardless of whether full body or cremation is chosen. The Christian faith is based in Jesus who through the Passion gives promise to eternal life for body and soul. The importance of burying the dead in sacred ground expresses our Christian faith.

“The body of a Catholic Christian is also the body once washed in baptism, anointed with the oil of salvation, and fed with the Bread of Life. Thus, the Church’s reverence for the sacredness of the human body grows out of a reverence and concern both natural and supernatural for the human person. The body of the deceased brings forcefully to mind the Church’s conviction that the human body is in Christ a temple of the Holy Spirit and is destined for future glory at the resurrection of the dead. This conviction in faith finds its expression in a sustained and insistent prayer that commends the deceased person to God’s merciful care so that his or her place in the communion of the just may be assured. A further expression is the care traditionally taken to prepare the bodies of the deceased for a burial that befits their dignity, in expectation of their final resurrection in the Lord.” (Order of Christian Funeral, no. 412)

The Importance of Funeral Rites and Pre-Planning Your Final Resting Place

For all of us, as death is a fact of life, pre-planning a funeral including the funeral liturgy is a great gift to those left behind. Not only do we encourage you to select your burial option,

we also encourage you to speak with your pastor, bereavement ministry, funeral director or our cemetery staff to discuss all of the details, such as prayers for the Vigil, readings for the Mass and Committal. These decisions can be made ahead of time, leaving freedom for the bereaved to grieve their loss and not be consumed by so many details.

Why Choose a Catholic Burial?

For Catholics the Holy Spirit dwells in the body, making the body sacred. The body must be treated with respect and dignity in life and in death. A Catholic burial expresses our Catholic faith, and as Catholics we should understand the importance of choosing a Catholic funeral and burial. As we celebrate the life of our loved ones, we joyfully and emotionally entrust them to our Lord, and we do this by choosing a Catholic Funeral Mass and burial. Although they have left our earthly world, they are not gone; life has only changed, not ended. Our loved ones have moved on, and they will be united with God and reunited with loved ones through the Paschal Mystery of Jesus Christ.





The Catholic Funeral Rite Consists of Three Parts

I. The Vigil Service

The Vigil Service focuses on the life of the newly departed loved one. The Vigil Service is usually held the eve before the Funeral Mass and burial rite. However, more recently many Catholics have chosen to hold the Vigil a few hours prior to the Funeral Mass. Your funeral

director along with your Pastor can help you decide what is best for you and your family. *“The Vigil for the Deceased is the principal rite celebrated by the Christian community in the time following the death and before the funeral liturgy...”* (Order of Christian Funeral, no. 54) The Vigil Service offers prayers, readings, remembrance of the deceased and the

viewing of the recently departed loved one. A reading or a prayer is selected by the family in conjunction with a priest or deacon who delivers it. Reflections, prayers of intercession and a blessing are also performed by a priest or deacon. During this time, we gather in prayer asking for mercy for our departed loved one. We also pray for strength, guidance and faith from God to help those grieving. *“At the vigil, the Christian community keeps watch with the family in prayer to the God of mercy and finds strength in Christ’s presence”* (Order of Christian Funeral, no. 56). It is a time for remembrance, support and comfort. A eulogy is typically delivered at the Vigil Service. Your pastor can give you guidance on when the eulogy should be delivered.

II. The Funeral Mass Liturgy

The Funeral Liturgy is the central liturgical celebration and thus is centered upon Jesus’ life, death and resurrection. It focuses on the presentation of the deceased to the Lord. As Catholics, the Funeral Mass is one more celebration of our journey towards God. Full of scripture and prayers commending the soul to the Lord, it is a liturgy of hope in the resurrection of the dead and life everlasting, as we proclaim in the Apostles’ Creed. The Funeral Mass begins with the reception of the body, continues with the celebration of Liturgy of the Word, the Liturgy of the Eucharist and concludes with the final commendation and farewell.

Many symbols are used including sprinkling the body with holy water, reminding us of baptism, burning of incense, placing the white funeral pall on the casket, placing the crucifix and Bible on the casket or next to the urn. All are signs of preparation for the body to be presented to the Lord. Although

the dearly departed loved one is gone from this earthly life, the Mass is beautiful, and it provides promise for eternal life while moving to a new spiritual relationship with God. *“If then, we have died with Christ, we believe we shall also live with Him.”* (Romans 6:8) Just as in the Vigil, family members and friends are encouraged to actively participate in the Mass. Their participation can provide great comfort to all.

III. The Rite of Committal

The Rite of Committal is the final farewell and takes place at a Catholic cemetery or mausoleum. From the Funeral Mass, the remains are taken to their final resting place. Here family and friends gather to say their final farewell and place the body in its eternal resting place awaiting Resurrection through Jesus Christ. The rite begins with an invitation at the gravesite, Scripture verse, and a prayer over the place of committal. The rite continues with words of committal, the intercessions, and the Lord’s Prayer. The rite ends with a concluding prayer and a prayer over the people which includes the verse Eternal rest, and a blessing. A priest or deacon presides over the burial location and leads all in attendance. For graveside committal, typically everyone places a flower or sprinkles holy water on the coffin and says good-bye. For a committal held in a chapel mausoleum, family and friends are invited to sprinkle holy water over the deceased’s casket or urn as a final farewell. The Rite of Committal is the climax of a Catholic funeral. For those who have chosen to be cremated the Catholic teachings call for the remains to be interred immediately following the Funeral Mass, or as soon as possible, after cremation when the full body was present at the Funeral Mass.

The Importance of a Catholic Cemetery

The Catholic cemetery embraces the responsibility to care for the remains of the departed loved one. It is here that family members will come to honor and celebrate the loved one through remembrance like attending memorial Masses and placing flowers on the grave during special times of the year, especially during the month of November when we begin with the celebration of the Solemnity of All Saints, followed by the Commemoration of All the Faithful Departed. The Catholic Church encourages all Catholics to visit and pray for those who have gone before us. Ultimately, we pray and hope for the day when we will meet again in Heaven. The burial of the dead is a Corporal Work of Mercy; it honors the children of God, who are temples of the Holy Spirit.

The Church's Teaching Regarding Cremation

The Church does not forbid cremation unless it has been chosen for reasons which are contrary to Christian teaching. The Church prefers that cremation take place after the funeral liturgies. Ideally, cremation occurs after the Funeral Mass and is immediately followed by the Rite of Committal. In this situation, the full body of the deceased is present for the Mass. After the Mass, the body of the deceased is cremated. Upon return of the cremains to the family, your loved one's cremains should be laid to rest as soon as possible in sacred grounds, such as a Catholic Cemetery.

While it is still preferred for the body to be present for the Funeral Mass, in 1997 special permission was granted for the United States

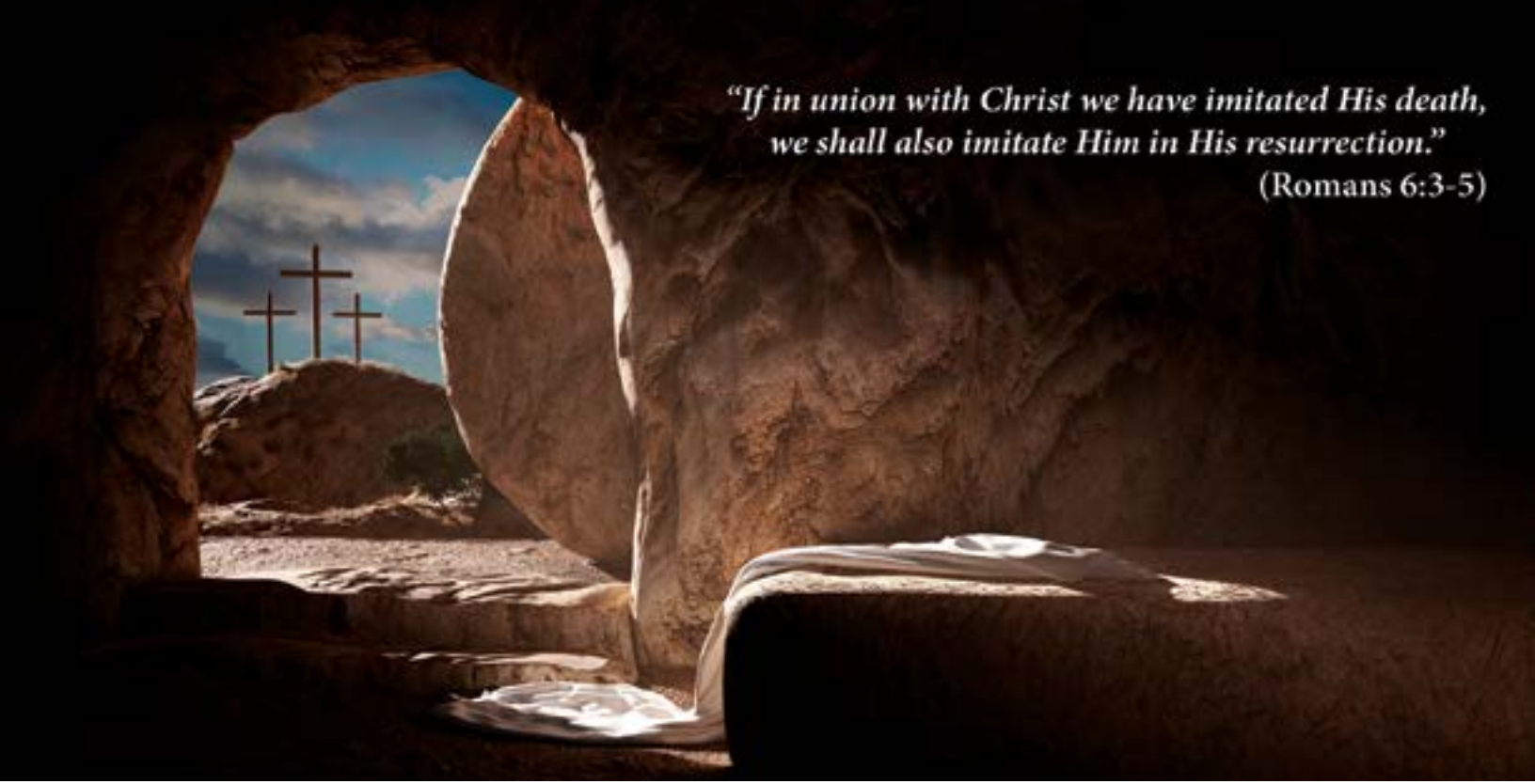
allowing each diocesan bishop to permit the celebration of Funeral Masses in the presence of cremated remains. The cremated remains of the body are to be placed in a worthy vessel. The plastic container or cardboard container into which the crematorium placed the cremated remains is sufficient for burial or placement in a niche in a cemetery.

A small table or stand is to be prepared for them at the place normally occupied by the coffin. The vessel containing the cremated remains may be carried to its place in the entrance procession or may be placed on this table or stand sometime before the liturgy begins. (Order of Christian Funeral, no. 427)

After the people have assembled, the Funeral Mass is celebrated as laid down in the Roman Missal and this ritual. Prayers which do not make reference to the honoring or burying of the body of the deceased should be chosen instead of those which have these themes. Following the prayer after Communion, the Rite of Final Commendation takes place. The alternate form for the dismissal is used. (Order of Christian Funeral, no. 428)

When the committal is delayed, or when the body is to be cremated before interment, the deacon or, in his absence, the priest says the following or similar words: "In the sure hope of the resurrection, we take leave of our brother/sister: let us go in peace." (Order of Christian Funeral, no. 437)

For Catholics, it is not an acceptable practice to scatter or divide cremains, nor are we permitted to combine cremains of multiple individuals together. Additionally, it is not an acceptable practice to preserve cremains in memorabilia such as jewelry or paper weights, nor is it acceptable to keep our loved one's urn



*“If in union with Christ we have imitated His death,
we shall also imitate Him in His resurrection.”*

(Romans 6:3-5)

at home. Cremated remains are the body of the deceased but in a changed form, and we must honor them as we honor the full body. They must be reverently buried or entombed in a place reserved for the burial of the dead, such as a Catholic cemetery.

Natural Burial in a Catholic Cemetery

The Church permits natural burials on sacred grounds. The body of Jesus was wrapped in a shroud and entombed in a natural setting. *“Taking the body, Joseph wrapped it [in] clean linen and laid it in his new tomb that he had hewn in the rock.”* (Matthew 37:50) A natural burial does not use embalming fluid, or a burial vault. With a natural burial, the body is placed in a biodegradable casket or wrapped in a shroud made of natural material such as cotton, wool, linen, bamboo or calico, and placed directly into the earth, allowing the body to decompose naturally. One major benefit of a natural burial is that there is minimum impact on the environment.

What is Not Permitted?

Central to the practice of and belief in Christianity is the respect and honor shown to the human body not only in life but in death. Separation of the body’s parts is not permitted as it is viewed as disrespectful and sacrilegious. Alternative practices such as composting and alkaline hydrolysis are not acceptable other practices because they go against the Catholic Church’s teaching of treating the body with respect and honor. Human composting results in a garden-type compost that is then scattered or reused in some way for another purpose, such as the planting of a tree or growing a garden. In the practice of hydrolysis, apart from bone residue, the remnants of the entire body are disposed of as waste. Additionally, it is possible that in some operations of the alkaline hydrolysis machines, the machine operator may first be required to physically manipulate the skull of the deceased in order to ensure the complete digestion of soft tissues. The treatment of the body in either case, is not with reverence, honor or respect and hence is not permitted by the Church.

When Death is Imminent or Has Occurred

IMMEDIATELY

- Arrange for organ donation, if applicable. Check driver's license of the deceased and/or advance directive to see if he/she was an organ donor.

- Notify close family and friends.

- Obtain a legal pronouncement of death. If the person died in a hospital, a doctor will handle this. If the person died in hospice care, hospice will handle this. If the person died somewhere without medical supervision (e.g. at home), call 911 and an arriving paramedic or EMT will direct you on how this is handled.

- Look for a planning type document or letter where the deceased identified his/her wishes.

- Find the last will and testament, if applicable.

- Look for pre-paid funeral arrangement documents.

- Call funeral home and schedule a meeting to complete funeral arrangements.

- Determine how the funeral services will be paid for if no pre-paid arrangements were made. Please note, in New Jersey, once a person dies, if the checking account is held individually, personal checks cannot be written using this account.

- Notify employer – determine any employment benefits such as pension and retirement plans, and any insurance coverage through the company (e.g. life, medical, accidental death and dismemberment, etc.).

- Arrange care for any dependents or pets. If children are school-age, notify the school and their teachers.

- Secure major property. If deceased lived alone, secure home and any vehicles. Locate any other valuables such as jewelry and cash and secure them in a safe place.

WITHIN A FEW DAYS

- Meet with funeral home and arrange funeral services. Funeral home will order death certificates, contact social security, and contact the cemetery to schedule the committal service. If a burial right has not already been purchased, a visit to the cemetery might be needed.

- Find and secure for future handling any important documents such as life insurance policies, stock certificates, real estate deeds, bank statements, brokerage statements.

- Write obituary – The funeral home will assist you with an outline or template. Include any organizations for preference of donations in lieu of flowers.

- If deceased was a veteran, or the spouse of a veteran, determine if there are any veterans' benefits.

- Meet with parish staff and/or pastor to arrange the funeral Mass. Decide on readings and hymns.

WITHIN A FEW DAYS (CONTINUED)

- Choose funeral participants – who will deliver eulogy, do readings, sing, act as pallbearers, etc.
- Set the funeral schedule – decide dates and time of vigil, funeral Mass, committal service.
- Determine if you will have a luncheon or gathering after the committal service. Decide on an at-home gathering or select and reserve a venue.
- Contact any life insurance companies to start their claims process.
- Secure post office mail, and if appropriate, have mail forwarded to executor's address.
- Perform more thorough check of the deceased's home, if the person lived alone. Look for anything that needs regular care. Toss any food that will expire, water plants.
- Notify and determine when appropriate to cancel any applicable insurance such as health insurance, vehicle insurance, and home owner's insurance. Note: Cancellation of any insurance of assets should not be done until the assets have been sold or transferred. If deceased was on Medicare, the Social Security office will inform them of the death, but if your loved one had Medicare Prescription Drug Coverage (Part D), a Medicare Advantage plan and/or a Medigap policy, you will need to contact each to cancel.

WITHIN A COUPLE OF WEEKS

- The named executor should start the probate process for the will. In New Jersey you have to wait 10 days after the person has passed away to meet with the county surrogate court.
- Follow up with social security to make sure no additional information is needed, and whether or not any payments need to be returned or if any one-time death benefits apply.
- Identify any bills that need to be paid.
- Determine any auto-pay bills occurring and decide what to do accordingly.
- Contact deceased's tax accountant to determine if any adjustments are needed for tax planning.
- Send out thank you notes for funeral services and gifts.
- Close any credit card accounts.
- Determine which social media accounts need to be closed.
- Access deceased's email account, review existing and incoming emails, determine any actions needed.
- Cancel the person's driver's license.
- Cancel any subscriptions and memberships that are no longer needed.
- Notify local election office of the death.
- Contact the three credit bureaus to prevent any identify theft.



Funeral Planning

Before completing this section, please read the preceding section on Catholic Teaching on Death & Burial.

FUNERAL HOME

Were Funeral Services Planned Ahead? Yes No

Name of Funeral Home

Address

City

State/Zip

Contact

Phone/Email

CEMETERY

Was a Cemetery Burial Right Pre-Purchased? Yes No

Name of Cemetery

Address

City

State/Zip

Contact

Phone/Email

Location of Deed/Certificate (if already purchased burial right)

Listed Owner of Burial Right

Phone/Email

Burial Right Location: Section | Lot | Plot | Lawn

Row

Grave, Crypt, Niche #

FUNERAL CHOICES

Burial Type: Full Body Cremation

Casket: Metal Wood
 Open Casket Closed Casket

Burial Location: Ground Above Ground - Crypt/Niche (*circle one*)

Body Preparation: Embalming No Embalming

Clothing: New Clothing From My Wardrobe

Location of Wardrobe Specify Clothing

Buried with Jewelry: Yes No

Specified Items

FUNERAL SERVICE

Vigil: Yes No
 Evening Day of Funeral Mass

Funeral Mass: Yes No

Committal Service: Open Private
 Day of Funeral Mass Later Date, if cremated
 At Sea Memorial Service without Remains

Other

Service Proceedings:

Name of Specific Priest or Deacon

Phone/Email

Veteran: Color guard, gun salute, service flags, taps

Additional Information

FUNERAL SERVICE

Flower Preferences (color & type)

In lieu of flowers, donations made to (list organization)

Additional Personalization:

Slideshow

Photo Display

Before completing the funeral liturgy section, please consult with your pastor or bereavement ministry about selecting appropriate readings for a Catholic funeral.

I. Vigil

Location:

Funeral Home

Church

Other _____

Scripture Readings:

1st Reading

Read by _____

2nd Reading

Read by _____

Eulogy Delivered by _____

Other Favorite Prayers or Poems to be read before or after the Vigil (include a copy)

II. Funeral Mass

Name of Church

Address

City

State/Zip

Contact (Priest/Deacon)

Phone/Email

Scripture Readings:

1st Reading

Read by _____

Responsorial Psalm

Read

Sung

2nd Reading

Read by _____

Gospel

Prayer of the Faithful

Read by _____

Presentation of Gifts by _____

Music Selections

Preferred Musician

Cantor

FUNERAL SERVICE

III. Committal Service

Cemetery Name

Address

City

State/Zip

Funeral Luncheon:

Yes

No

Immediate Family

Friends

Everyone

Venue or Caterer:

Venue or Caterer Name

Contact Person

Address

City

State/Zip

Preference on who to invite

Organ/Body Donation:

Yes

No

Donate full body

Donate body parts
(see below for listing)

List of Organ(s) to be donated

Contact

Address

City

State/Zip

Phone/Email

IV. Obituary

Local Town or Community Newspaper

Online

Professional or Trade Publications

Membership Publications

Other

FUNERAL SERVICE

IV. Obituary (continued)

Preference as to who should write the obituary: Yes No

If yes, list person writing the obituary.

Please include (check those you want included):

<input type="checkbox"/> Picture	<input type="checkbox"/> College Degrees	<input type="checkbox"/> Outstanding Work
<input type="checkbox"/> Place of Birth	<input type="checkbox"/> Military Service	<input type="checkbox"/> List of Survivors
<input type="checkbox"/> Cause of Death	<input type="checkbox"/> Memberships Held	<input type="checkbox"/> List of Family Preceded in Death

Additional Notes:

Please list hobbies, personal achievements, favorite memories, unique character traits, or other personal information that you as the preparer would like mentioned in your obituary.

PERSONAL & FAMILY HISTORY

I. Personal

Name *(first, middle, last, include maiden if applicable)*

Address

City

State/Zip

Birthdate

Birth City

Birth State/Zip

Father's Full Name

Father's Birthplace

Mother's Full Name

Mother's Birthplace

Marriage Status:

Single

Married

Divorced

Name of Spouse *(first, middle, last, include maiden if applicable)*

Date and Place of Marriage

Location of Marriage Certificate

II. Children

Child's Name

Birthdate

Address

Phone/Email

Child's Name

Birthdate

Address

Phone/Email

Child's Name

Birthdate

Address

Phone/Email

Child's Name

Birthdate

Address

Phone/Email

Child's Name

Birthdate

Address

Phone/Email

PERSONAL & FAMILY HISTORY

III. Education

School Name/Location	From/To	Degree
School Name/Location	From/To	Degree
School Name/Location	From/To	Degree

IV. Work History

Company Name	From/To	Position
Company Name	From/To	Position
Company Name	From/To	Position

V. Military Service

Branch	From/To	Serial #
Rank	Enlistment Date	Discharge Date
Location of Discharge Papers (e.g., Form DD 214)	Citations, Recognition, and Awards	Wars Fought

Member of Veteran or Reserve Organizations:

VI. Clubs & Organizations

Name	From/To	Position
Name	From/To	Position
Name	From/To	Position

PERSONAL & FAMILY HISTORY

VII. Relatives & Friends *(notify of my death)*

		Notify Before Funeral	Notify After Funeral
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
Name	Relationship		
_____	_____		
Address	Phone/Email		

PERSONAL & FAMILY HISTORY

VIII. Medical Information For Family History

- Cancer _____
- Heart Disorder _____
- Kidney Disorder _____
- Circulatory Disorder _____
- Diabetes _____
- Other _____
- Other _____

IX. Physicians

Name	Medical Specialty	Phone/Email
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List additional medical information including any implants or cosmetic devices.
(These may need to be removed before cremation occurs.)

LEGAL DOCUMENTS

I. Last Will and Testament

Yes, I have a Will No, I do not have a Will

A Last Will and Testament is a legal document that allows you to specify the distribution of your assets after your death. A will also allows you to appoint a guardian, for minor children, and a trustee to manage assets that are left to children and young adults. A will is important because it gives you the ability to appoint an executor giving him/her the ability to follow and execute your wishes. Wills should be updated when major life occurrences happen such as a marriage, birth of a child, death of heir. A will should be kept in a safe, secure place. Some people create a Living Trust which includes a will. Your lawyer is able to advise you if a Living Trust is needed, including the benefits.

Location

Date of Will

Attorney/Firm who drew Will

Phone/Email

II. Power of Attorney (POA)

Yes, I have a POA No, I do not have a POA

When creating your will, your attorney can also create a Power of Attorney. A POA assigns a person to oversee your financial decisions if you should become incapacitated. You should assign a second person in case the first person is not able to fulfill the responsibilities. There are different types of POA and your lawyer can review these with you.

Location

Date of POA

Attorney/Firm who drew POA

Phone/Email

III. Health Care Directive (Advance Health Care Directive — AHCD)

Yes, I have an AHCD No, I do not have an AHCD

An AHCD is a legally written document stating how you want medical decisions to be made if you lose the ability to make them for yourself. An AHCD allows you to specify if you want to go on life support in extreme situations, and to designate someone who will make sure your wishes are carried out or make any decisions not covered by your AHCD. Without an AHCD, the courts may have power over such decisions.

Location

Date of AHCD

Primary Agent

Phone/Email

FINANCIAL INFORMATION

I. Life Insurance

Insurance Company

Death Benefit Value

Agent's Name

Phone/Email

Location of related records & policy with policy number.

Insurance Company

Death Benefit Value

Agent's Name

Phone/Email

Location of related records & policy with policy number.

II. Group Life Insurance Coverage with Employer or other Organizations

Insurance Company

Death Benefit Value

Agent's Name

Phone/Email

Location of related records & policy with policy or certificate number.

Insurance Company

Death Benefit Value

Agent's Name

Phone/Email

Location of related records & policy with policy or certificate number.

FINANCIAL INFORMATION

III. Financial Advisor

Name

Phone/Email

IV. Stock Broker

Name

Phone/Email

V. Banking

Bank Name

Phone/Email

Account Type

Account Number

Account Registration

Bank Name

Phone/Email

Account Type

Account Number

Account Registration

Bank Name

Phone/Email

Account Type

Account Number

Account Registration

VI. Safety Deposit Box | Storage Units

Bank/Storage Name

Box/Unit Number

Address

Phone and Contact

Location of Keys and any Notes

Bank/Storage Name

Box/Unit Number

Address

Phone and Contact

Location of Keys and any Notes

FINANCIAL INFORMATION

VII. Pension(s) & Retirement Account(s)

IRA, 401k, 403b, Roth IRA, Inherited IRA

Include type of account, account number, contact information

VIII. Securities

Stocks, bonds/treasury

Include location of each.

IX. Real Estate

Include type, address, locations of papers, and deeds.

X. Vehicles

Include type of vehicle (car, RV, boat, etc.), year, make, model, location of title, location of keys.

XI. Jewelry

Include list of items with description, location and estimated fair market value.

XII. List of other insurance coverage

List type and include contact information for homeowner's, vehicle, umbrella coverage, long term disability, accidental death and dismemberment.

XIII. Other Items

FINANCIAL INFORMATION

XIV. Liabilities

a. Mortgage(s) & home equity lines of credit

Yes, I have insurance to pay off loans at time of death.

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

b. Car or Vehicle Loan(s)

Yes, I have insurance to pay off loans at time of death.

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

Year, Make, Model

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

Year, Make, Model

Lender Name

Phone/Email

Account Number

Is loan on auto-pay?

Year, Make, Model

FINANCIAL INFORMATION

c. Other Notes Payable

Yes, I have insurance to pay off loans at time of death.

Lender Name Phone/Email

Account Number

Lender Name Phone/Email

Account Number

d. Credit Cards

Yes, I have insurance to pay off loans at time of death.

Lender Name Phone/Email

Account Number Is loan on auto-pay?

Lender Name Phone/Email

Account Number Is loan on auto-pay?

Lender Name Phone/Email

Account Number Is loan on auto-pay?

XV. Passwords (List where to find the passwords)

Computer Login /Password:

Online Financial Accounts:

Banking, brokerage (stocks), pension, credit cards, insurance, etc.

SOCIAL MEDIA & ADDITIONAL CONSIDERATIONS

I. Social Media

List which accounts you want closed/deleted:

List which accounts you want left active after your death for ongoing memorialization and include login and password for each:

II. Confidential Accounts (e.g., social media, bank, insurance, etc.)

Are there any accounts you don't want anyone to access or know about after your death?

If yes, determine a trusted person to leave in charge of confidentially closing those accounts. Confidential instruction will need to be prepared, sealed and left with someone to initiate action after your death. The person you trust to hold onto the confidential information and the person you trust to open and act on the confidential information may or may not be the same person. Trusted persons can include family members, friends, your attorney or accountant, etc.

III. Additional Instructions/Comments:



SOUTH JERSEY CATHOLIC CEMETERIES

Your Choice † Your Privilege † Your Right

A Ministry of the Diocese of Camden

631 Market Street | Camden, NJ 08102

855-MyPrePlan (855-697-7375) | SouthJerseyCatholicCemeteries.org