

LOCKE FUNERAL SERVICES
ADVANCED PLANNING BIOGRAPHICAL RECORD

Email: _____ **Date:** _____
Phone: _____

Name Known By: _____

Full Given Name: _____

Residence: Street & Number: _____

City: _____ **State:** _____ **Zip:** _____

Formerly of: _____

Birth Date: _____ Race: _____ Sex: _____ Hispanic? _____

Birth Place: _____, _____ County: _____

Father's Name: _____ Mother's Maiden Name: _____

Education: Highest Grade Completed _____

Education information: _____

Marital Status: (circle one): Married Widowed Divorced Never Married

Marriage Information:

To:

When:

Where:

Date of Death:

Occupation: _____ **Social Security No.:** _____

Kind of Business: _____ Employer: _____

Position Held: _____ Years with Company: _____ Retired Since: _____

Church, Lodge, Club Associations, and Special Interests:

Church _____ Membership _____

Lodges, Clubs, Activities:

Special Interests:

Military Information:

Entered Service: _____ Date: _____

Separated from Service: _____ Date: _____

Grade/Rank: _____ Branch of Service: _____ V.A.C. #: _____

Organization Served With _____ Service No.: _____

FAMILY

SURVIVORS: Relationship, Name, (Spouse)	Street Address, or City & State	Phone
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Grandchildren: _____ **Gt. Grandchildren:** _____ **Gt. Gt. Grandchildren:** _____

Their Names /spouses: _____

Preceded in death by: _____

FUNERAL SERVICE INSTRUCTIONS AND INFORMATION

Place of Service: _____

Clergy (1): _____ /of _____

Or (2): _____

Organist: _____ Vocalist: _____

Special Music or Hymns: _____

Favorite Bible Passages, Quotations, Poetry, etc: _____

Visitation/Service Requests: _____

Food/Luncheon Requests:

Casket Bearers (If Available):

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Flower Requests:

Memorial Donations:

CEMETERY:

Name of Cemetery: _____

Location, City _____ State: _____ County: _____

Contact: _____

Grave Description: Section: _____ Lot No.: _____ Space: _____

Marker installed? _____ Purchased from _____

Other Cemetery Merchandise and Services Pre-Purchased: _____

List any Special Clothing To be Used:

List any Jewelry/Glasses To be worn and if to be removed, to whom returned:

Hairdresser: _____

Other Special Instructions:

Participating Organizations (Fraternal/Military Rites):

Service Folder Information:

Printing Package Selected: _____

Special Verse/Poem: _____

Thank You's Selected: _____

Picture included: Yes _____ No _____

Obituary on Funeral Home Website and Newspapers

Newspapers to Notify: _____

Designee if Applicable (please make sure a current copy of the Declaration of Designee For Final Disposition is on file)

Name and Address of Designee

Phone # and Email Address

KEEP THIS SECTION FOR YOUR RECORDS

NOT FOR FUNERAL HOME

The following information will help your family organize your finances at the time of death. It should also be kept in a lockbox or given to a family member.

Insurance Policies: Include the type of policy, issuing company, location of the policy, agent, and agent's phone number.

Bank Accounts: Include bank name, account number, and type of account.

Stocks and Bonds: Include broker name, phone number and the location of your portfolio

Pension Plans or Annuities: include company and account number.

Credit Cards: include company, account number, and phone number:

Real Estate Owned: include street address, city, and state.

Location of Important Papers

Mortgage: _____

Military Discharge: _____

Vehicle Titles: _____

Safe Deposit Box:

Bank: _____ Key _____

Will: _____

Deed or Notes: _____

Other Important Papers: _____

People to be Contacted: include names and phone numbers:

Include the names of your:

Physician: _____

Optometrist: _____

Dentist: _____

Pharmacist: _____

Accountant: _____

Attorney: _____

Internet Accounts:

Do you have a list of all your internet accounts, including usernames and passwords? Do you know what will happen to your email and social media accounts after death? We suggest you organize a list of your email, social media, financial institutions, business, social organizations, and service provider accounts. This will make it much easier for your loved ones to close your accounts and protect them from hackers and identity thieves.

Our staff can assist your family with many details following the service. These details include:

- Recognizing things that need to be done
- Notifying Social Security Administration
- Applying for Veterans Administration Benefits
- Obtaining certified copies of the Death Certificate
- Assisting with other benefits and claims