

Pennsylvania Funeral Planning Organizer

Help your family make decisions during a difficult time by recording your wishes in one place.

Why this matters

Funeral planning is one of the first things a family faces after a death. Without written guidance, grieving family members must guess at preferences, compare prices under stress, and sometimes argue over what you would have wanted. This organizer lets you record your wishes in advance and tells your family where to find the information.

1. Final arrangements

- Burial or cremation
- Preferred funeral home or crematory
- Preferred cemetery or scattering location, if applicable
- Religious or cultural traditions to observe
- Any pre-paid funeral contract or burial insurance policy
- Veteran or fraternal organization benefits to claim

2. Service preferences

- Visitation or wake: yes/no, public/private
- Religious service, memorial, or celebration of life
- Preferred officiant or speaker
- Music, readings, or poems
- Flowers, donations to charity, or both
- Open or closed casket
- Clothing or jewelry you want to be buried or cremated in

3. People to notify

- Immediate family members
- Close friends
- Employer or professional contacts
- Clergy, counselor, or spiritual advisor
- Veterans' services, if applicable

4. Documents your family will need

- Original will and any trust documents
- Birth certificate and Social Security card
- Marriage certificate, divorce decree, or military discharge papers (DD-214)
- Life insurance policies and annuity contracts
- Bank and investment account statements
- Deeds and vehicle titles
- List of digital accounts and passwords

5. Estate contacts

- Attorney who drafted your will or trust
- Financial advisor or accountant
- Insurance agent
- Executor or trustee
- Funeral home already selected

6. Notes for your family

Use this space for anything not covered above: messages to your family, preferences for photographs or social media, charitable donation requests, or instructions for pets. Keep this organizer with your other estate planning documents, and tell your executor or a trusted family member where it is.

7. Cost controls

Pennsylvania funeral homes must provide a General Price List on request. Consider setting a maximum budget for final arrangements, or pre-paying only after comparing options and understanding refund or transferability terms.

This guide is for general educational purposes and does not create an attorney-client relationship or constitute legal advice. Pennsylvania law changes, and your facts may require a different strategy. Consult an attorney before acting.

For a Pennsylvania-specific consultation, call Quinlan Law Group at (717) 724-7503 or visit paestateplanning.attorney.