

# Arrangement Meeting Preparations

1. Review the agenda and prepare for the meeting.

2. Gather all necessary documents and information.  
3. Identify key stakeholders and invite them to the meeting.  
4. Prepare a clear and concise presentation of the issues.

5. Practice your presentation and anticipate questions.  
6. Review the meeting objectives and desired outcomes.  
7. Prepare to listen and engage with other participants.

8. Arrive on time and be prepared to start the meeting.  
9. Follow the agenda and keep the meeting on track.

# Agenda: What We'll Talk About

1. Welcome and introductions  
2. Review of the meeting objectives  
3. Presentation of the issues  
4. Discussion and Q&A  
5. Summary and next steps

6. Meeting closure

7. Follow-up

8. Meeting minutes

9. Meeting evaluation

10. Meeting wrap-up

11. Meeting minutes

12. Meeting wrap-up

# Arrangements Checklist

The following is a list of information and items that will be needed for your funeral director to complete required legal documentation, as well as to help with your loved one's obituary and final arrangements. If you don't have all of this information right now, don't worry. We can get it in the days ahead. This is just a checklist to help you get organized.

## Information about your loved one:

Full legal name \_\_\_\_\_

Location of death \_\_\_\_\_

Date of birth \_\_\_\_\_

Social Security Number \_\_\_\_\_

## For your loved one:

Clothing *(including undergarments) (if applicable)*

Shoes and socks or hosiery *(if applicable)*

Eyeglasses and jewelry

*(these items may remain with your loved one or be removed and returned after the service) (if applicable)*

Dentures *(if applicable)*

## To help with arrangements:

A recent photograph

A collection of valued photographs (20-40) for memorialization through printed materials and video tributes

U.S. Armed Forces serial number and veteran's discharge papers *(if applicable)*

List of 6-8 pallbearers *(if applicable)* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Cemetery arrangement information *(if applicable)* \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## To gather for obituary/notices:

Place of birth (*city, state/province*) \_\_\_\_\_

Education/work history (*resume or professional bio if applicable*) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mother's full name (*including maiden name*) \_\_\_\_\_

Father's full name \_\_\_\_\_

Name of place of worship or religious affiliation \_\_\_\_\_

\_\_\_\_\_

Place and date of marriage (*if applicable*) \_\_\_\_\_

Organizations or memberships \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Special achievements \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

List of those who recently predeceased your loved one \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Name(s) of surviving relatives and the cities in which they live

(*include daughters, sons, brothers, sisters, and number of grandchildren and great grandchildren*)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_