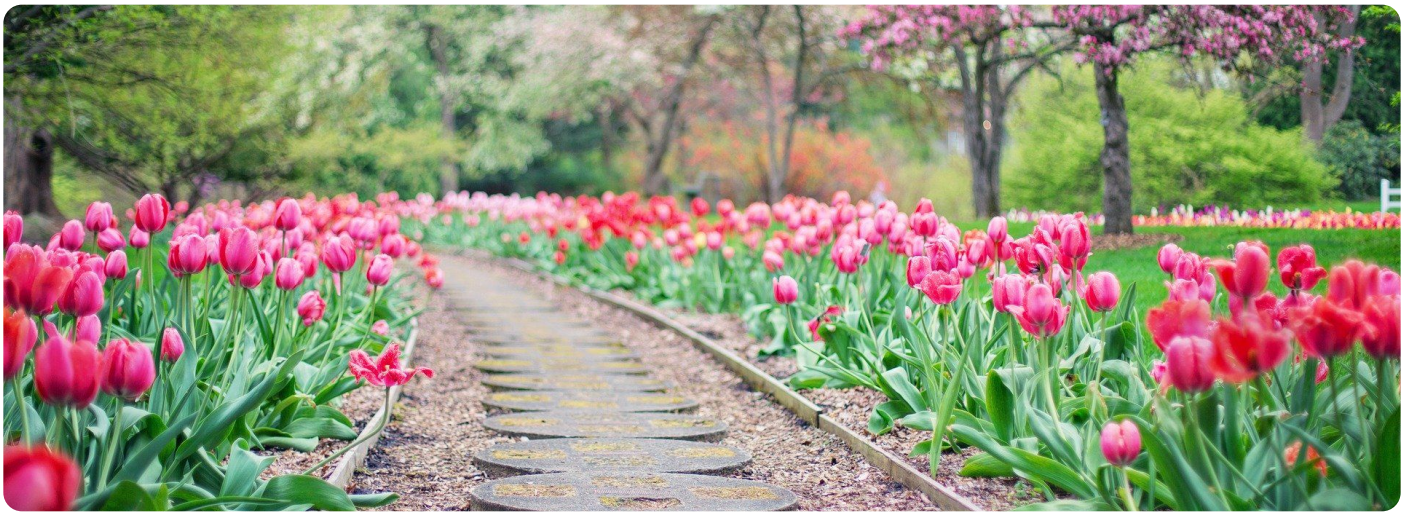
A thoughtful start.

Three things to know about planning ahead



Time to think about what matters most.

Photo: Jill Wellington / Pixabay

01 Why plan ahead?

Putting your wishes into words now can give the people you love a clearer starting point later. Preplanning is a chance to think, ask questions and make choices at your own pace.

Share your wishes

Consider the kind of service, traditions and personal touches that matter to you.

Give family direction

Help loved ones know your wishes and face fewer decisions during an already difficult time.

Make room to think

Explore options, talk about costs and leave time for questions before decisions are needed.

You do not need every answer today.

Use the next two pages to gather a few details and jot down what matters most.

02

A little preparation.

Bring what you have. Leave anything undecided blank, and ask the Chapel which documents would be helpful for your meeting.

- [ ] **Basic personal and family details**
  Names and contacts, plus details you want ready for an obituary or death certificate.
- [ ] **Any plans already in place**
  Copies of existing funeral, cremation or cemetery arrangements, if any.
- [ ] **Ideas that make it personal**
  A few photos, music selections, traditions or stories you may want to share.
- [ ] **Military discharge papers, if applicable**
  Bring a DD214 if available; ask about any other documents you may need.

Start with the basics

Type in the boxes, or print and write by hand. All fields are optional.

Your name

Date

I am planning for (myself or someone else)

People I would like to include in the conversation

03

Your wishes, your pace.

At a preplanning meeting, we can discuss service or cremation preferences, obituary and death certificate details, choices such as a casket when relevant, and documents you may need to sign. Bring your questions, even if you are unsure where to begin.

Prepayment and price protection

You can plan without prepaying. When you fully fund pre-need selections, Chapel guarantees its services and merchandise at the agreement prices while selections stay the same. Outside costs and later additions are excluded.

Service or gathering preferences

Personal touches: music, readings, traditions or memories

Questions I would like to ask

Ready to talk?

Call to arrange a preplanning conversation.

(650) 588-5116
194 Millwood Drive, Millbrae
California FD 915

Save a completed copy in a PDF reader, then reopen it to check your entries. Keep it private and bring it to your meeting. This worksheet does not submit information, arrange services or create a contract.

Learn more: California Cemetery and Funeral Bureau - Pre-need Q&A