

Planning a Legacy of Care, Clarity, and Purpose

Protect your loved ones, honor your values, and leave behind more than just assets.

Combining Clarity and Care

Thinking about the end of life is never easy—but it's one of the most loving things you can do for the people you care about. When we don't leave clear instructions behind, families are often left guessing, unsure of what we would have wanted. In a time already filled with emotion, those unanswered questions can lead to stress, conflict, and even financial strain. That's why this planner was created - to give you a space to document your wishes, reflect on your legacy, and take intentional steps now to ease the burden later. Whether you envision a full service or something simple, whether you wish to leave behind financial gifts or heartfelt words—this is your plan, in your voice.

What You'll Find Inside...



My Funeral Preferences

This section allows you to record what kind of service you want, how you'd like to be remembered, and any personal details—from music to flowers to final resting place.



Legacy Wishes

Document any financial gifts you'd like to leave behind—whether to family, a church, or a cause that matters to you. There's also space to leave a message, blessing, or note that can be passed along with love.



Funeral Budget Estimator

This section allows you to record what kind of service you want, how you'd like to be remembered, and any personal details—from music to flowers to final resting place.



One Last Wish

This space is yours to tell your story—your memories, milestones, dreams, and reflections. These words can become a keepsake for your family, a reminder of who you were and what mattered most.

Your Wishes, Your Voice - A Guide for You and Your Loved Ones Future



This guide is about you—your preferences, your values, and your voice. It's a place to write things down clearly, honestly, and in your own words, so the people you care about won't have to wonder what you would have wanted.

Whether you already know exactly what you'd like, or you're just starting to think about it, this isn't about doing it all perfectly—it's about making things easier for the people who love you. Think of this as a gift: a way to reduce stress, avoid confusion, and bring comfort when your family needs it most. From funeral preferences to financial wishes to memories you'd like to share, everything in this guide is here to help your loved ones feel confident, supported, and guided—by you. There are no right answers. Just your answers.

And that's exactly what your family will be grateful for.



My Funeral Preferences

Please check any preferences you have and fill in as much or as little as you wish.

I Would Prefer...

- ☐ Traditional Funeral Service
- ☐ Memorial Service
- ☐ Graveside Only
- ☐ Celebration of Life
- ☐ No Service

I Would Prefer...

- ☐ Burial
- ☐ Cremation
- ☐ Donation to science
- ☐ Other:

I Would Like...

- ☐ Visitation/Viewing
- ☐ Open Casket
- ☐ Closed Casket
- ☐ No Viewing

Preferred Locations

Church or Chapel:

Funeral Home:

Cemetery:

Desired Officiant: _____

I would like the following read/played...



Scriptures or Readings



Music/Songs



Vocallists or Musicians



Poems or Personal Messages



*I would like these
flowers.*

And these colors.



*Please serve this food
or refreshment*



*I would like these
people to speak*

Special Instructions

e.g., clothing, items in casket, cultural practices, etc.



Funeral Budget Estimator



Expense Category	Estimated Cost
Funeral Home Services	\$
Casket or Urn	\$
Burial Plot/Cremation Fees	\$
Flowers	\$
Service/Venue Fees	\$
Officiant/Speaker	\$
Honorarium	\$
Transportation/Hearse	\$
Obituary/Program Printing	\$
Reception/Food	\$
Other:	\$



Estimated Total: _____

My Legacy Wishes

This section is to help document how you'd like to leave a financial or emotional legacy.

I would like to leave money to...

☐ *Children or Grandchildren*

Names:

☐ *A friend or loved one*

Names:

☐ *My church*

Name:

☐ *A nonprofit, or cause I care about*

Name:

Estimated Total: _____

Would you like to include a note, blessing, or message to those you're leaving this for?

This Is What I Would Like You to Remember About Me

Sometimes, the most meaningful legacy isn't about money—it's the stories, memories, and pieces of who we were. This section allows you to leave behind something personal for your loved ones to hold onto. Share as much or as little as you like.

My Early Life