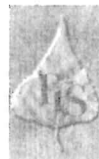


# ADVANCED FUNERAL PLANNING

Personal Information Record  
“PRIVATE AND CONFIDENTIAL”



EASTGATE  
FUNERAL & CREMATION  
SERVICE



PARKWAY  
FUNERAL & CREMATION  
SERVICE

# PERSONAL INFORMATION

Full Name \_\_\_\_\_ SSN \_\_\_\_\_

Address \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ County \_\_\_\_\_ No. of Years \_\_\_\_\_ Sex \_\_\_\_\_

Date of Birth \_\_\_ / \_\_\_ / \_\_\_ Age \_\_\_\_\_ Place of Birth \_\_\_\_\_

Marital Status \_\_\_\_\_ Date of Marriage \_\_\_ / \_\_\_ / \_\_\_ City \_\_\_\_\_

Spouses Maiden Name \_\_\_\_\_

Father's Name \_\_\_\_\_ Birthplace \_\_\_\_\_

Mother's Maiden Name \_\_\_\_\_ Birthplace \_\_\_\_\_

Occupation \_\_\_\_\_ Employer \_\_\_\_\_ Retired \_\_\_\_\_

Positions Held \_\_\_\_\_

Education \_\_\_\_\_

Religious Preference \_\_\_\_\_ Church \_\_\_\_\_

Fraternal, Service and Union Memberships \_\_\_\_\_

Veteran \_\_\_\_\_ Branch of Service \_\_\_\_\_

Enlistment Date/Place \_\_\_\_\_

Discharge Date/Place \_\_\_\_\_

Newspapers to Contact \_\_\_\_\_

<u>Name</u>	<u>City/State</u>	<u>Phone No.</u>
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Parents:

Daughters:

Sons:

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Brothers:

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Sisters:

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Other Family Members:

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Preceded in death by:

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Funeral Service at \_\_\_\_\_

Visitation/Rosary at \_\_\_\_\_

Officiating Clergy \_\_\_\_\_

Organist \_\_\_\_\_ Soloist \_\_\_\_\_

Music Selections \_\_\_\_\_

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Favorite Bible Passages, Poetry, Quotations \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Flower Requests \_\_\_\_\_

\_\_\_\_\_

Decisions of Clothing and Jewelry to Made by \_\_\_\_\_

I prefer the following clothing: New \_\_\_\_\_ Present \_\_\_\_\_

Color \_\_\_\_\_

Pallbearers

<u>Name</u>	<u>City/State</u>	<u>Phone No.</u>
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\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Cemetery \_\_\_\_\_ Plots purchased: Yes \_\_\_\_\_ No \_\_\_\_\_

Section \_\_\_\_\_ Lot \_\_\_\_\_ Space \_\_\_\_\_

Marker purchased: Yes \_\_\_\_\_ No \_\_\_\_\_ Installed: Yes \_\_\_\_\_ No \_\_\_\_\_

I have not arranged for a burial plot, but would like to be buried at \_\_\_\_\_

\_\_\_\_\_

I, \_\_\_\_\_, have given the preceding information, to be filed in the funeral home of my choice, in order to assist my family and loved ones when making my final arrangements at the time of my death.

Date \_\_\_\_\_

# PERSONAL INFORMATION

Casket Selection \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

Vault Selection \_\_\_\_\_

Description \_\_\_\_\_

\_\_\_\_\_

Cremation \_\_\_\_\_

Description \_\_\_\_\_

Urn/Other Memorial Items \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_



# ADVANCE PLANNING

# Seven Substantial Benefits

## PEACE OF MIND

Don't leave your family with such a heavy responsibility at an already emotionally overwhelming time. Putting your final wishes in writing and setting aside adequate irrevocable funds allows your loved ones to focus on their journey through grief. In many ways, it's a final gift of love from you to your family.

## DIGNITY & CONTROL

Arranging your funeral in advance ensures your final wishes are carried out the way you would want. It enables you to consider your personal preferences and design a service that is especially meaningful and healing for loved ones. Before your death, you retain the right to change funeral homes or funeral service decisions. These rights pass to your family after death occurs.

## TAX-FREE INFLATION GUARD

When funds are held in an irrevocable insurance trust, all growth on your funeral plan is tax free.

## FREE, NO-OBLIGATION CONSULTATION

Our Advance Funeral Planner guides you through the process and explains the many options available. By planning ahead, you have time to learn more and make thoughtful decisions.

## SAFE FUNDS

Once your funds are secured in an irrevocable agreement, no one can make any withdrawals. When your policy is established, the ONLY way that the funds will be released is with a signed copy of the funeral bill and a certified death certificate.

## MEDICAL ASSISTANCE ASSET PROTECTION

Unlike other investments (including cash value of traditional life insurance) that you own, the dollars you place into a structured preneed policy will not count as an asset if you have to apply for Medical Assistance. The full cost of your funeral can be 100% protected using an irrevocable insurance trust. (Burial space items for immediate family members can also be protected.)

## NO PROBATE OR DELAY

When you use an irrevocable assigned insurance trust to hold your dollars, the funds are immediately available to pay funeral costs. With your permission, the funds can even be paid directly to the funeral home that provides the funeral goods and services. There is NO probate or delay.

2302 East Divide Avenue  
Bismarck, ND 58501  
Phone: 701-223-7322

Email: [info@eastgatefuneral.com](mailto:info@eastgatefuneral.com)  
[www.EastgateFuneral.com](http://www.EastgateFuneral.com)



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Bismarck, ND 58503  
Phone: 701-223-1100

Email: [info@eastgatefuneral.com](mailto:info@eastgatefuneral.com)  
[www.ParkwayFuneral.com](http://www.ParkwayFuneral.com)

Because every family's situation is unique, certain restrictions and exemptions may apply. All benefits listed above may not be available in every case. Planning now, before serious health or other problems arise, gives you the widest range of options. Laws may change at any time, so this should not be considered legal or tax advice.