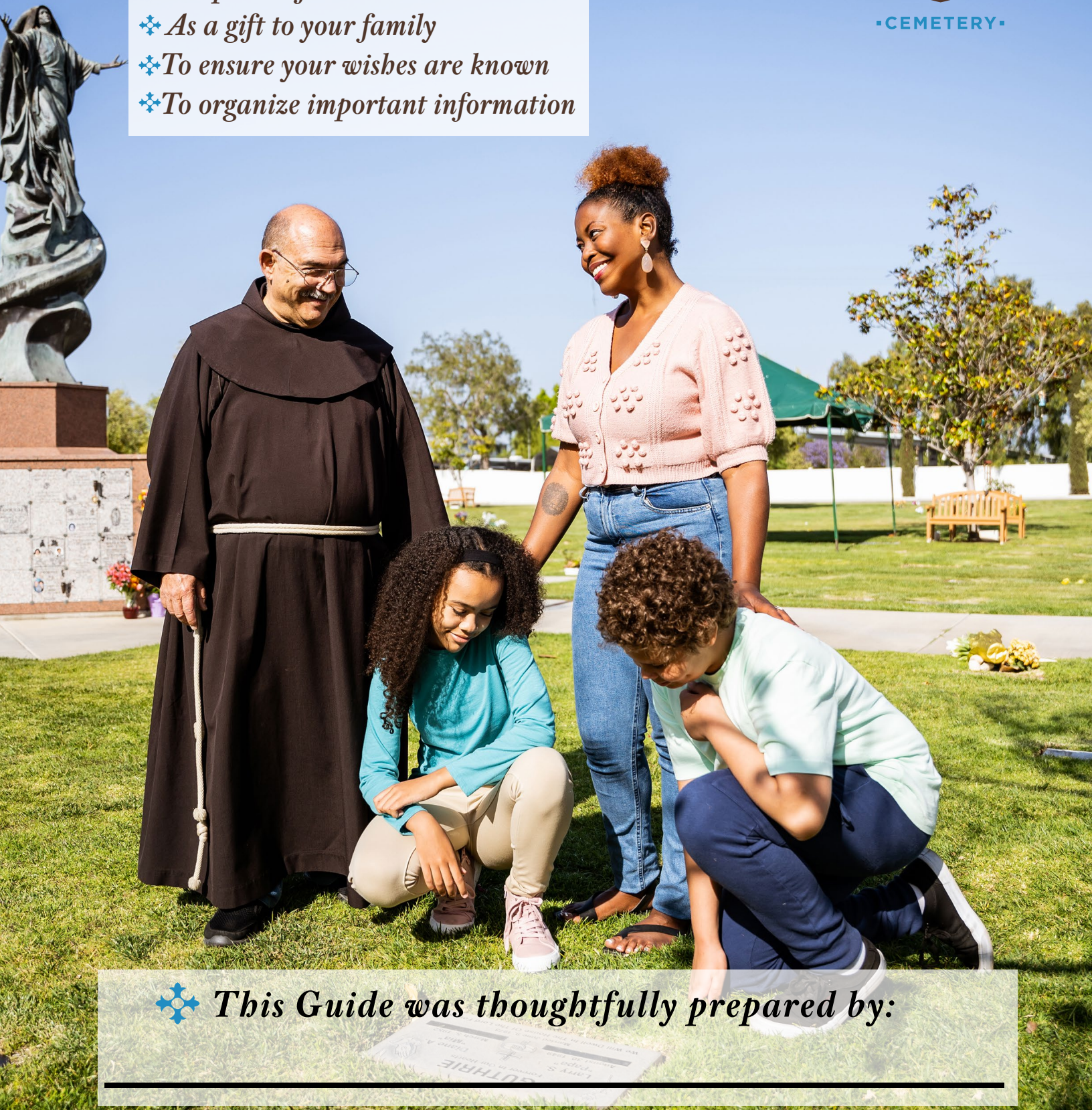


# Pre-Planning Guide



## Why You Should Pre-Plan:

- ❖ *For peace of mind*
- ❖ *As a gift to your family*
- ❖ *To ensure your wishes are known*
- ❖ *To organize important information*



❖ *This Guide was thoughtfully prepared by:*



**NOTE:** *If your loved one has just passed away, please see pages 19 - 20 for important first information.*

This Pre-Planning Guide was designed to help you record and organize important information, personal thoughts and your final wishes.

Please note that there could be sensitive information in the completed guide, therefore:

- Store documents safely
- Share with a trusted person
- Review and update this guide regularly
- Keep copies with key contacts



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# Pre-Planning Workbook

- ❖ Personal History
- ❖ Important Documents & Information
- ❖ Funeral Home Arrangements
- ❖ Cemetery Service Arrangements

*“Remember that when you leave this earth, you can take with you nothing that you have received – only what you have given.”*

~ St. Francis of Assisi

Our Cemetery staff is here to assist you, whether you are preplanning your funeral or you have a loved one that has passed away.

Please call us at (760) 231-8445 to speak with our dedicated and caring staff.

# Personal History Worksheet ✦

*One of the concerns people often voice is that their parents passed away without writing down their own personal history. Loved ones also appreciate pertinent information to inform an obituary.*

Full Legal Name: \_\_\_\_\_

Name I'm Known By: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Parents' Names: \_\_\_\_\_

Grandparents' Names (maternal): \_\_\_\_\_

Grandparents' Names (paternal): \_\_\_\_\_

Siblings: \_\_\_\_\_

Spouse/Partner: \_\_\_\_\_

Children: \_\_\_\_\_

Grandchildren: \_\_\_\_\_

Other Important Friends and Family Members: \_\_\_\_\_

Schools Attended & Years: \_\_\_\_\_

Wedding Date/Place: \_\_\_\_\_

Church/Faith Community: \_\_\_\_\_

Military Service (Branch, Dates, Rank): \_\_\_\_\_

Career/Work History: \_\_\_\_\_

Clubs & Organization Memberships: \_\_\_\_\_

Hobbies & Pastimes: \_\_\_\_\_

Other: \_\_\_\_\_

**NOTE:** *If personal history information is used to inform an obituary, brevity can be helpful. Obituary pricing is per line. Contact your local paper for pricing.*

# Important Documents: Information ❖

These three documents make the biggest difference for the people you love. These vital documents will be the legal documents to follow before and after your passing.

## Your Will

A will is a legal document that spells out who receives your property, who cares for any minor children, and who serves as executor — the person who carries out your wishes. Without a will, state law decides. A simple will can be drafted with an attorney (often in one or two short meetings) or with a reputable online service. Keep the original somewhere safe and tell your executor where to find it.

**TIP:** *Mission San Luis Rey offers a free resource for creating a will or trust. Powers of Attorney and Advanced Medical Directives can also be created. Visit [FreeWill.com/sanluisreyparish](https://FreeWill.com/sanluisreyparish) to start your free will.*

## Healthcare Directives

In the state of California, an **Advance Directive** (sometimes called a Living Will) tells doctors what medical treatment you do — and do not — want if you are unable to speak for yourself. A **Healthcare Power of Attorney** names the person who will make those decisions on your behalf. Both documents should be on file with your primary physician and shared with your named decision-maker. Most hospitals will provide the forms at no cost.

## Social Security Benefits

Social Security may provide a small one-time death benefit and ongoing survivor benefits for an eligible spouse or minor children. Your funeral home often reports the death to Social Security, but a surviving spouse or family member should also call **1-800-772-1213** to confirm and apply for any benefits owed.

When contacting Social Security you will need these documents:

- Social Security Number
- Marriage License
- Children's Birth Certificates
- W2 for the previous two years, if applicable
- Proof of widow(er) age if 62 years or older
- Certified copy of death certificate (funeral home will provide)
- Military Discharge Papers, if applicable
- Medicare Information

# Important Documents: Checklist ❖

Check what exists, note where it's kept, and share this information with a trusted family member or friend.

## Legal

- ☐ Last Will and Testament — stored at:\_\_\_\_\_
- ☐ Advance Directive /Living Will — stored at:\_\_\_\_\_
- ☐ Durable Power of Attorney — stored at:\_\_\_\_\_
- ☐ Healthcare Power of Attorney — stored at:\_\_\_\_\_
- ☐ Trust documents — stored at:\_\_\_\_\_

## Vital Records

- ☐ Birth certificate — stored at:\_\_\_\_\_
- ☐ Marriage certificate (or divorce decree) — stored at:\_\_\_\_\_
- ☐ Social Security card — stored at:\_\_\_\_\_
- ☐ Passport/driver's license — stored at:\_\_\_\_\_
- ☐ Military discharge papers (DD-214) — stored at:\_\_\_\_\_
- ☐ Medicare card and policy details — stored at:\_\_\_\_\_

## Financial and Property

- ☐ Deed(s) to property — stored at:\_\_\_\_\_
- ☐ Vehicle titles — stored at:\_\_\_\_\_
- ☐ Recent tax returns (last three years) — stored at:\_\_\_\_\_
- ☐ Home safe combination/ Safe deposit box key & bank — stored at:\_\_\_\_\_
- ☐ Life insurance policy paperwork — stored at:\_\_\_\_\_

**TIPS:** *The single most helpful thing you can do is to write down one location where most of this information is kept. A lockable fireproof safe or cabinet is an excellent place to store your important documents.*



# Important Documents: Digital Records ❖

## Your Digital Life

*Your phone, your email, your photos, your social media accounts — fill in what applies in the spaces below; skip what doesn't.*

## Devices, Email & Cloud

Phone Passcode: \_\_\_\_\_

Computer/Laptop Password: \_\_\_\_\_

Primary Email Address: \_\_\_\_\_

Email Password: \_\_\_\_\_

Backup/Recovery Email: \_\_\_\_\_

iCloud/Google Account Email: \_\_\_\_\_

## Photos & Memories

Where my photos live (iCloud, Google Photos, external drive, photo album):

\_\_\_\_\_

## My Social Media Accounts

Facebook username: \_\_\_\_\_ password: \_\_\_\_\_

Instagram username: \_\_\_\_\_ password: \_\_\_\_\_

Linkedin username: \_\_\_\_\_ password: \_\_\_\_\_

YouTube username: \_\_\_\_\_ password: \_\_\_\_\_

Other: \_\_\_\_\_

## My Trusted Digital Contact

To set up legacy features on Meta (the parent company of Facebook and Instagram), you can designate a “Legacy Contact” to manage your Facebook memorialized account or choose to have your account permanently deleted. Meta’s Legacy Contact process is detailed online.

Name & Phone: \_\_\_\_\_

\_\_\_\_\_

*For more information on how to set up legacy features on social media, scan the QR code.*



# About Funeral Arrangements ❖

A few thoughtful decisions made now can spare your family from making a dozen decisions under duress. Here's an overview of the choices you'll see on the pages that follow.

## The Funeral Home

A funeral home is your family's primary guide in the first hours after a death. They coordinate the transfer of your body, prepare the death certificate paperwork, and walk your loved ones through every decision from visitation to burial or cremation. Some people choose a funeral home in advance and pre-pay, which locks in today's prices and removes a financial decision from grieving loved ones.

## Burial & Cemetery Choices

Your options include traditional burial in a casket or cremation. Cemetery plots can be purchased in advance. If you already own one, note the cemetery name, and other pertinent information on the pages ahead so your family doesn't need to search for them.

## The Service Itself

A Catholic funeral may include a Vigil (a rosary or prayer service the night before), a Funeral Mass, and the Rite of Committal at the cemetery. Reception details — where to gather afterward — matter too; Appendix A or B walks through specific planning choices.

## Military Considerations

If you are a veteran, you may be eligible for burial at no cost in a military cemetery. If you choose a different cemetery, you can still have military honors performed at the graveside — you will need your Veterans Discharge Papers (DD-214 form). Let your Funeral Home know of your veteran status when you meet with them.

**TIPS:** *We recommend a family-owned funeral home as they don't work for commission. They are typically smaller and can provide personalized support. Prepaid insurance is available through a funeral home, and is recommended. It stays with you regardless of where you live.*

*The funeral home provides you with the timing for the funeral and will coordinate the burial with the cemetery staff. They will coordinate the transportation of your loved one to the cemetery, and assist with pallbearers if needed during the funeral service and at the burial.*

# Funeral Home Arrangements ❖

Pre-selecting a Funeral Home is very important. They will be responsible for ordering death certificates which are vital for life insurance, wills, etc.

## Funeral Home Details

Funeral Home Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Contact Person: \_\_\_\_\_

## Funeral Insurance

Insurance Company Name: \_\_\_\_\_

Policy #: \_\_\_\_\_

## Burial Preference

Casket Burial: \_\_\_\_\_

Cremation: \_\_\_\_\_

Notes for whoever arranges the service \_\_\_\_\_

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# Cemetery Service Arrangements ❖

Things to consider when selecting a Cemetery:

- Burial Type
- Religious & Cultural Affiliation
- Proximity to loved ones
- Is it a setting that gives you a feeling of peace? When your loved ones visit, will it feel healing and beautiful? Will there be staff to greet them and provide support and resources?

**ABOUT MISSION SAN LUIS REY CEMETERY:** *Mission San Luis Rey Cemetery is an inclusive, historic cemetery that is a National Historic Landmark. It welcomes families of all faiths and cultural backgrounds. Dedicated to honoring our Franciscan charism, military veterans, and preserving the region's rich multi-cultural heritage, our compassionate and bilingual staff is available to assist you in designing a funeral that aligns with your family's faith, values and traditions.*

## My Preference

- ☐ Casket - burial in ground
- ☐ Casket - burial in Mausoleum
- ☐ Cremation - burial in ground
- ☐ Cremation - interred in Columbarium/Niche
- ☐ Cremation - Green burial

**Marker/Headstone Inscription** (We recommend doing this as part of your preplanning so it is based on your wishes.) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Cemetery Details

- Cemetery Name: \_\_\_\_\_
- Address: \_\_\_\_\_
- Contact Phone: \_\_\_\_\_
- Deed #: \_\_\_\_\_

## Service Location

- Funeral Details and Location — more details in Appendix A or B: \_\_\_\_\_
- \_\_\_\_\_

## Reception and Other

- Reception Location: \_\_\_\_\_
  - Other Special Instructions: \_\_\_\_\_
- \_\_\_\_\_

**FOR VETERANS:** *Eligible veterans can request a free grave marker from the Department of Veterans Affairs (800-827-1000 or va.gov)*

# What Do I Do Next?

This section is devoted to what will need to happen upon your passing and is meant to help guide your loved ones immediately and in the days, weeks and months to come.

*“Start by doing what is necessary, then what is possible, and suddenly you are doing the impossible.”*

~ St. Francis of Assisi



# What to do Within a Few Days ❖

## Meet with the Funeral Home

Is there a prepaid plan in place? If your loved one pre-arranged a funeral or cremation and/or purchased cemetery property, the funeral home may already have this information. Even if there's no formal plan in place, but your loved one wrote down preferences and wishes, share that at the funeral planning meeting. Gather important information (see pages 19 and 20). You will need to provide certain information at the funeral arrangement conference in order to get the death certificate process going. That information includes your loved one's:

- Full Legal Name
- Social Security Number
- Date and Place of Birth
- Address at the Time of Death
- Marital Status and the Surviving Spouse's Full Legal Name, if applicable
- Veteran Discharge Papers (DD-214), if applicable
- Father's Name
- Mother's Full Name, including Maiden Name
- Highest Level of Education and Occupation
- Information for the Obituary, if desired
- Preferences for a Funeral and Burial
- Choices about Location, Date, and Time of Services
- Cemetery Arrangements

## Meet with the Cemetery

A funeral planning meeting is the time for you to plan a tribute for your loved one. You should take your cues from the information they've provided and wishes they've expressed in the pages of this booklet. You will sit down with a bereavement minister or cemetery staff member and share your loved one's life, your family's traditions, your cultural and religious beliefs, and your vision for the funeral. You'll plan for specific religious or cultural traditions to be included in the funeral service. You can also discuss personal touches such as photos and music. See Appendix A or B.

## Prepare an Obituary and/or Eulogy

The facts you'll need are contained in the **Personal History** (page 2) of this booklet. Think about how to celebrate the loved one's life, not just announce their death, highlighting the impact they made on those around them. Including personal stories, cherished memories, and meaningful contributions gives a sense of character, values, and the love shared with family and friends.

**Note:** *The obituary should focus on your loved one's life and legacy. We recommend not including information about the funeral in the obituary.*

## What to do Within a Week ❖

These are the tasks that are important to consider within the first week of a loved one's passing (check pages 19 and 20 for contact information):

- If employed, contact the deceased's employer. Ask about final paycheck, life insurance, pension, or any other work-related details.
- If the home is unoccupied, move any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (e.g., lamp timers). You may also ask a relative to stop by to check on plants, throw out perishable food, collect mail, and make sure the house is secure.
- If the deceased's home is unoccupied, cancel unnecessary home services such as newspaper delivery, cable subscriptions, etc., and contact the police to let them know the home is unoccupied.
- Order 5-10 certified copies of the death certificate (the funeral home will arrange). At a minimum, banks, insurance companies, Social Security and the DMV will each want one. **Note: Not everyone needs a certified copy; some may only need a photocopy.**
- Notify religious, fraternal, and civic organizations in which the deceased was a member.
- If applicable, notify agent under Power of Attorney.
- Once the memorial details are confirmed, share the time, date, and location of the services with those closest to you. Ask them to share with friends and the wider community. You can do this via phone, email, text, or social media.

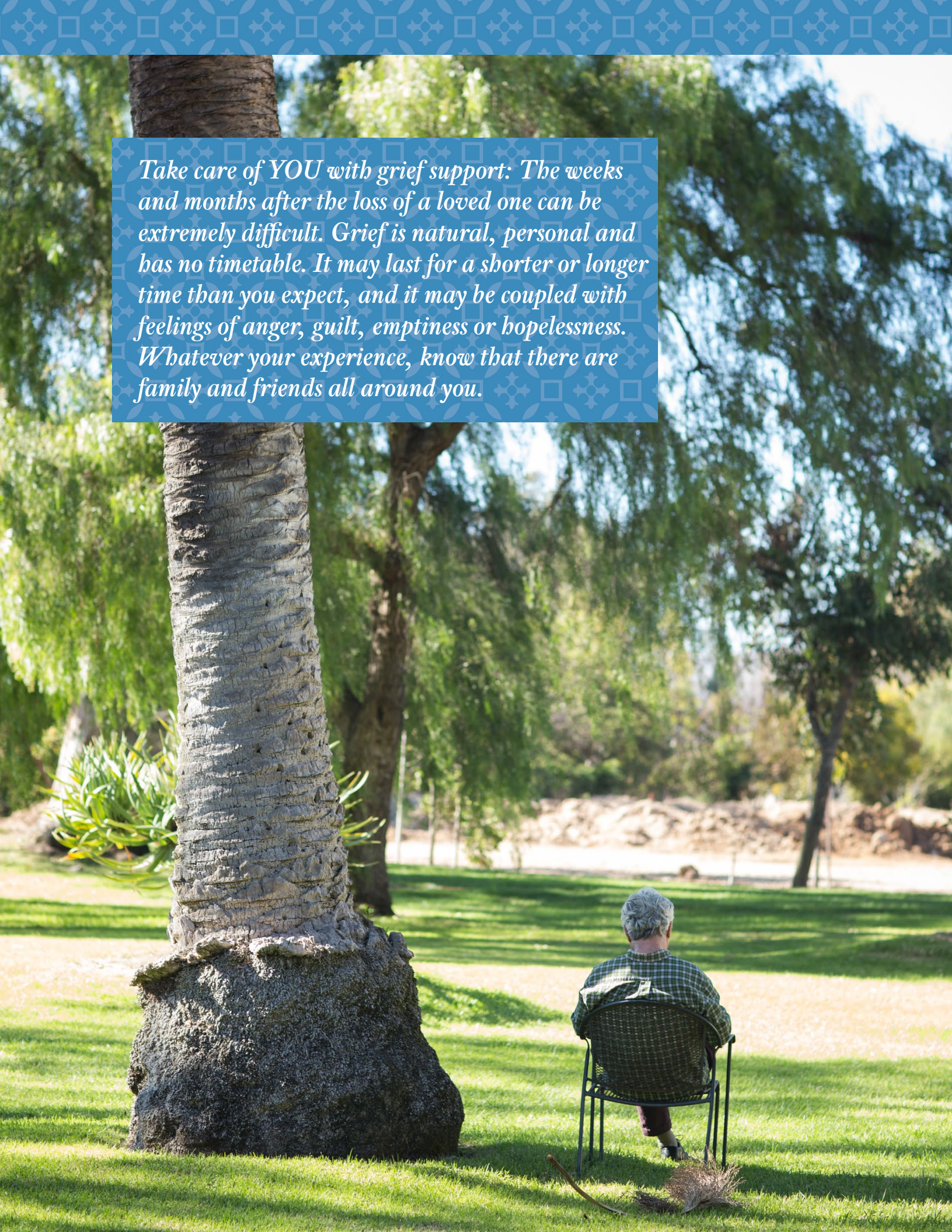


## What to do Within a Month ❖

Weeks two through four tend to be when the paperwork intensifies. Work through at a steady pace - not all in one sitting. Now is the time to start gathering important documents that are necessary to settle one's estate. Ask a trusted family member or friend for help if these tasks become overwhelming.

- Begin probate if required in your state (the estate attorney can advise).
- Contact the accountant about filing a final tax return; gather W-2s and 1099s.
- Notify the three major credit bureaus (Experian, Equifax, TransUnion) to prevent identity theft.
- Cancel non-essential recurring charges: cable, streaming, gym, newspapers, magazines. Keep insurance and utilities until the estate is settled.
- Update joint accounts, and file a new W-4 if you've lost a spouse.
- Department of Motor Vehicles - cancel your loved one's driver's license; transfer vehicle titles and update auto insurance.
- Contact pension providers and 401K/IRA custodians about survivor benefits
- Social Security (800-772-1213; ssa.gov) - stop benefits, obtain survivor benefits, address Medicare if applicable.
- Department of Veterans Affairs (800-827-1000; va.gov) - if your loved one was a veteran, contact for survivor benefits.
- Insurance companies (health, life, homeowner, automobile) - update beneficiaries, stop or transfer benefits, cancel policies. A death certificate is typically required.
- Banks - update beneficiaries and inquire about safe deposit boxes and remaining accounts.
- Post office (usps.com) - notify USPS of the death and set up mail forwarding.
- Pharmacy - cancel prescriptions. The pharmacy will advise on how to safely dispose of medications.
- Remove loved one from mailing lists.
- Registrar of Voters - have your loved one's name deleted from the voting rolls.
- Online companies - decide what to do with your loved one's digital footprint. Begin memorialization or deletion of Facebook and Instagram (See **Digital Records** section, page 5). Meta and Google each have policies for memorializing or shutting accounts.
- Make a list of annual obligations in the next 12 months (property taxes, renewals, anniversaries).

***Grief doesn't move in a straight line. Some days in month one may feel worse than day three. That is normal. There is no right or wrong way to grieve.***

A photograph of a person with short grey hair, wearing a green and white plaid shirt, sitting on a black metal chair in a park. The person is seen from behind, looking towards a large, thick tree trunk on the left. The ground is covered in green grass, and there are other trees and foliage in the background. A blue banner with a white geometric pattern is overlaid on the top left of the image, containing white text.

*Take care of YOU with grief support: The weeks and months after the loss of a loved one can be extremely difficult. Grief is natural, personal and has no timetable. It may last for a shorter or longer time than you expect, and it may be coupled with feelings of anger, guilt, emptiness or hopelessness. Whatever your experience, know that there are family and friends all around you.*

# Two Months and Beyond - Grief and Grace

Around week eight, the meals may stop arriving and the phone calls may slow. For many, this is when grief feels loudest. None of it is unusual. All of it passes - though not on a schedule.

## Grief is Not a Task to Finish

Grief is the love you still have, looking for somewhere to go. There is no correct timeline, no gold-star finish line, and no prize for getting through it quickly. Some weeks you will feel almost steady; others, a song in a grocery store will undo you. That is grief doing its work - not you doing it wrong.



## What Tends to Help

- A standing weekly walk or coffee with someone who will listen.
- A grief support group. You don't have to talk - just show up.
- A small daily ritual: lighting a candle, a morning prayer, keeping a photo somewhere you'll see it.
- Writing letters to the person you lost, even though they will go unread.
- Gentle physical movement - walking, yoga, swimming - grief lives in the body.
- A counselor or grief therapist, especially around the first set of anniversaries, birthdays, and holidays.

Mission San Luis Rey has grief support groups and retreats for bereaved people who might benefit from them. Find a group or resource that can support you during a tender time. The parish has a Grief Support Ministry; call 760-547-0752 and leave a message. Your call will be returned promptly.



## Remaining Checklist

- ☐ Send acknowledgement cards for flowers, donations, food, or any significant gestures of kindness. Remember to thank pallbearers.
- ☐ Organize and distribute the deceased's personal belongings.

**Resource:** *The mission has an App that contains reflections and meditations that may be a helpful companion during this time.*

*Here is a link and QR code to access them:*



<https://sanluisrey.org/free-app/>

*"What we have once enjoyed, we can never lose. All that we love deeply becomes a part of us." ~ Helen Keller*

# Appendices

A - Planning a Catholic Funeral Mass

B - Planning a Service

C - Stories and Anecdotes

D - In Your Own Words



## Appendix A ✦

# Planning a Catholic Funeral Mass

**Priest** \_\_\_\_\_

**Location** \_\_\_\_\_

**Readings**

- First Reading: \_\_\_\_\_
- Responsorial Psalm: \_\_\_\_\_
- Second Reading (if applicable): \_\_\_\_\_

**Gospel** \_\_\_\_\_

**Intercessions you'd like to recommend** \_\_\_\_\_

**Songs**

- Gathering Song: \_\_\_\_\_
- Offertory Song: \_\_\_\_\_
- Communion Song: \_\_\_\_\_
- Song of Committal: \_\_\_\_\_
- Closing Song: \_\_\_\_\_

**Pallbearers** \_\_\_\_\_

(if casket burial) \_\_\_\_\_

**Prayer Cards**

- Front \_\_\_\_\_
- Back \_\_\_\_\_

**Flower Choices or Donation in Lieu of Flowers** \_\_\_\_\_

**Eulogist** \_\_\_\_\_

(A eulogy can usually be done prior to the beginning of Mass. Please consult with your bereavement minister or priest. **NOTE: Encourage Eulogist to write their eulogy in advance.**)

**Gravesite Requests/special traditions or rituals**

**Plan a Reception**

- Location: \_\_\_\_\_
- Decor/Theme: \_\_\_\_\_
- Music Choices: \_\_\_\_\_
- Food Preferences: \_\_\_\_\_
- Special Photos: \_\_\_\_\_
- Other Requests: \_\_\_\_\_



## Appendix B ✦

# Planning a Funeral Service

**Service/Celebration of Life** \_\_\_\_\_

**Presider/Speaker** \_\_\_\_\_

**Location** \_\_\_\_\_

### Special Readings (e.g., prayers, poems, reflections)

- Selection: \_\_\_\_\_  
Selection: \_\_\_\_\_
- Selection: \_\_\_\_\_

### Pallbearers

(if casket burial)

|       |       |
|-------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

### Memorial Cards

- Front: \_\_\_\_\_
- Back: \_\_\_\_\_

**Flower Choices or Donation in Lieu of Flowers** \_\_\_\_\_

### Eulogist

**NOTE:** *Encourage Eulogist to write the eulogy in advance.*

### Gravesite Requests

- **Special traditions or Rituals** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- **Military Honors**

Branch of Military: \_\_\_\_\_

**Notify the Military for honors to be performed at graveside.**

### Reception Planning

- Location: \_\_\_\_\_
- Decor/Theme: \_\_\_\_\_
- Music Choices: \_\_\_\_\_
- Food Preferences: \_\_\_\_\_
- Special Photos: \_\_\_\_\_
- Other Requests: \_\_\_\_\_



## Appendix C

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## Appendix D

[illegible]

# ✦ IMPORTANT INFORMATION FOR LOVED ONE ✦

*This page (front and back) will address immediate actions  
you will need to take upon my passing.*

FIRST, take a deep breath; perhaps say a prayer. It's OK to take a break and go for a walk if you need to. There are just a few things you need to do right away:

- If you are not in a hospital or with hospice care, call 911 as soon as possible
- Contact the funeral home for transportation.

Funeral home: \_\_\_\_\_

Phone #: \_\_\_\_\_

- Contact friends and family.

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- Contact Priest/Minister.

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- Arrange for immediate care of pets (If applicable).

**TIPS:** *When you reach out to immediate family or close friends for support, stick with the facts and keep calls/texts/emails simple and concise. It's OK to tell others that you're still processing what's happening and that you don't have all the answers yet. Do NOT give out any funeral dates until you have spoken with the funeral home and cemetery. If people genuinely offer to help, let them. It will give you time to begin grieving and make arrangements. Take time to care for yourself and get any help you may need.*

*There is more information in the "What Do I Do Next?" section (pages 9 to 14) of this workbook that will help you navigate the coming weeks and months.*

*continued*

- Find my important documents. If I have things like funeral home insurance, a cemetery deed, and life insurance you may need them right away.
- Pre-purchased Funeral Home Insurance:

Name: \_\_\_\_\_ Policy #: \_\_\_\_\_

- You may need information regarding my funeral service choices very soon.

Preferred Cemetery:

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

Deed Number for burial place (if already purchased): \_\_\_\_\_

Burial type: Casket (full body) or urn (cremation): \_\_\_\_\_

- Other Important contacts you may need soon:

- My Attorney:

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- My Accountant or Financial Advisor:

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- My Insurance Agent:

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- My Employer (If applicable):

Name: \_\_\_\_\_ Phone #: \_\_\_\_\_

- Service Preference:

Catholic Funeral Mass at: \_\_\_\_\_

or, Funeral Service at: \_\_\_\_\_

(Details of service preferences are in Appendix A or B of this guide)

- Reception following burial (if applicable):

Venue Name: \_\_\_\_\_

Venue Contact and Phone #: \_\_\_\_\_

Special instruction for the reception: \_\_\_\_\_

\_\_\_\_\_

Special mementos you would like to provide guests: \_\_\_\_\_

\_\_\_\_\_

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

\_\_\_\_\_



Our Cemetery staff is here to assist you, whether you are preplanning your funeral or you have a loved one that has passed away.

Please call us at (760) 231-8445 to speak with our dedicated and caring staff.



Discover. Embrace. Connect.

*I hope this guide provided peace and  
❖ comfort for my loved ones as they ❖  
planned my funeral and burial.*