

Advance  
Funeral  
Planning:  
You're in the  
driver's seat

Tatyana A. Fowler,  
Advance Funeral  
Planner



# Ballard-Durand Funeral Home



21 W Stevens Ave  
Hawthorne, NY 10532



2 Maple Avenue  
White Plains, NY 10601



72 E Main Street  
Elmsford, NY 10523



**Waterbury & Kelly**  
1300 Pleasantville Road  
Briarcliff Manor, NY 10510  
**Leach & Thomas – Waterbury & Kelly**  
45 South Highland Ave  
Ossining, NY 10561



Next of kin under New York law are, in the following order:



1. Surviving spouse
2. Children
3. Parents
4. Siblings
5. Authorized Guardian
6. Grandchildren
7. Nieces/Nephews
8. Grandparents
9. Aunts/uncles
10. Cousins

## Who is Mary's NOK?

- **I am divorced**
  - **I am engaged to my fiancé**
- **Have three children, ages 13, 15, 17**
- **Dad is still alive, he is in a memory care facility**
- **Two siblings, I only speak with one**
- **My friend, Dorothy, is my power of attorney and health care proxy**
- **My ex-husband is still the executor of my will**

“I don’t want my legal next of kin to be responsible.”

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NEW YORK STATE DEPARTMENT OF HEALTH  
Bureau of Funeral Directing

**Appointment of Agent to Control Disposition of Remains**

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(Your name and address)

being of sound mind, willfully and voluntarily make known my desire that, upon my death, the disposition of my remains shall be controlled by

(name of agent)

With respect to that subject only, I hereby appoint such person as my agent with respect to the disposition of my remains.

**SPECIAL DIRECTIONS:**  
Set forth below are any special directions limiting the power granted to my agent as well as any instructions or wishes desired to be followed in the disposition of my remains:

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Indicate below if you have entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law for funeral merchandise or service in advance of need:

No, I have not entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law.

Yes, I have entered into a pre-funded pre-need agreement subject to section four hundred fifty-three of the general business law.

(Name of funeral firm with which you entered into a pre-funded pre-need funeral agreement to provide merchandise and/or services)

**AGENT:**

(Name)

(Address)

(Telephone Number)

SEE OTHER SIDE ►

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## Will they know: Vital Statistics?

- First, Middle, Last Name
- Maiden last name
- Birthday
- Social Security
- Place of birth
- Marital Status
- Father's first, middle, last name
- Mother's first, middle, last name & maiden last name
- Race
- Ethnicity
- Cemetery/Crematory Information
- Highest level of education
- Occupation and industry
- Last employer
- Veteran status and DD-214 form



# Will they know?

**Notify:** All relatives • Friends of the deceased • Former employer and business contacts • Clergy representatives • Religious, fraternal, civic, veterans associations, etc. • Insurance companies  
Funeral director • Memorial park • Medical professionals • Casket bearers • Service participants and performers • Newspapers • Attorney, accountants and other estate executors

**Gather vital information and documents:** Name, home address, telephone number • Time in current state • Social Security number • War Veterans serial number • Birth date • Place of birth Father's name • Father's birth place • Mother's maiden name • Mother's birth place • Employment information • Will • Birth certificate or legal proof of age • Marriage license • Citizenship papers Insurance policy numbers/records • Bank books • Deeds and titles to property • Income tax returns • Veterans discharge certificate • Disability claims • Cemetery plot ownership certificate

**Decide and arrange:**

funeral director  
Memorial type and  
cremation Casket

150 + things in 48 hours

Meeting with the  
Burial location  
inscription Burial or  
type Clothing for

deceased • Vault or sectional crypt Type of funeral service • Service readings, scriptural selections, etc. • Clergy to officiate • Arrange for any special religious requests Which funeral home • Location to hold the service • Time and date of the funeral service Provide possible charities for donations in the name of the deceased Eulogy and obituary content • Select names for pall-bearers • Flower arrangements • Music selections • Preparations for guests Transportation for the funeral Securing the burial permit Inviting all those interested in attending Responding to condolence calls and letters • Meeting with friends and family • Coordinating lodging for out-of-town visitors • Create a thank you list Order death certificates **Pay for:** Burial plot • Memorials & markers Funeral home services Interment service • Clergy • Florist • Clothing Transportation Food & hosting • Medical services Other urgent bills (mortgage, rent, taxes, etc.)

# Burial – Traditional to Green and everything in between



# Cremation – Services before or memorial after



# What will you do with the ashes?



# Veteran's Benefits

- A Gravesite or Niche in any of 135 National Cemeteries
- Opening and Closing of the Grave or Niche
- Outer burial container / vault
- Headstone / marker
- Perpetual Care of the Government Grave Space
- Marker for non-Veteran cemetery headstone
- Burial Flag and Presidential Certificate at No Cost
- Honor Guard
- Free NY Death Certificates



# Advance Funeral Planning Process

Creating a  
personalized  
plan



Funding your  
personalized  
plan

# Creating a personalized plan: First Four Questions



## **Type of Disposition?**

- Burial (traditional or green), entombment (above ground burial), cremation

## **Visitation/Viewing?**

- Private viewing/ID by family (no embalming), closed casket visitation (no embalming), open casket visitation/viewing (yes embalming)

## **Funeral Service?**

- Religious (clergy-led) or non-religious (celebrant or family-led)? At the funeral home, place of worship or graveside?

## **If Burial or Entombment / If Cremation:**

- If burial or entombment you will need cemetery property, if cremation - intention for cremated remains?

# How do families pay for funeral services?

Family pays at  
the time of  
death

Funding your  
plan in advance

Remember: You cannot pay with a decedent's funds!

Irrevocable  
Trust  
(Medicaid)

- Price-guaranteed and inflation-proof
- Qualify for Medicaid
- No lookback period
- Price-guarantee
- Transferable

Revocable  
Trust

- Price-guaranteed and inflation-proof
- Payment plan (up to 5 years) at no interest
- No lifestyle/ health questionnaire
- Price-guarantee
- Transferable

Funding in advance with New York's PrePlan Trust

# Everyone will work with a funeral home – even if you're not having any services



## **Find one you're comfortable with before you need one.**

- Transportation from place of death to the funeral home
- Temporary storage until the burial, cremation, or entombment is scheduled and paperwork is completed
- Contacting social security
- Collecting vital statistics, filing for death certificates, getting death certificates signed by M.D
- Printing, having NOK sign and submitting necessary burial permits and cremation authorizations
- Scheduling cremation with crematory or opening of grave with cemetery
- Transporting you to the crematory/cemetery
- Supervising and care for the deceased from place of death to final disposition