



## Kujde to help you Record and Remember

SCHEDULES and REMINDERS

The kindnesses, messages and personal assistance that you friends will render to you in the next few days and the accepted social procedures to follow in expressing your thanks.

Visitation
Family to Arrive
Services
Family to Arrive
Other Appointments
Things to Bring to Funeral Home



## The Importance of Planning

It is human to put things off. But proper planning for the event of one's death can spare a family many traumatic decisions and financial burdens.

#### **Prearrangement of Funerals**

The desires and wishes for ones funeral, burial and expenses can be specified to eliminate confusion, differences of opinion and difficult decisions on the part of family members. Prearranging a funeral may seem a difficult task, but there can be peace of mind for anindividual who knows that his or her wishes will be followed. Consult the Funeral Director of your choice for more information and guidance in funeral pre arrangement.

#### **Estate Taxes**

Your estate, when evaluated for federal estate taxes, will probably be much larger than you think. Generally included in your taxable estate are life insurance, real estate, stocks and bonds, personal checking and savings accounts, market value of business interests, household furniture, collections, autos and other tangible property. Be certain to consult an attorney periodically about current federal and state inheritance tax laws.

Other property may be included in vour taxable estate such as gifts of property made by you or to you, property in trusts created by you and property in trusts for you. Your estate will pay less taxes - and vour survivors will receive more of vour hard-earned estate- If you PLAN.

#### Wills

Estate taxes can de reduced signinicanty in the decedent has prepared a well-conceived will through an attorney. Also, your property and the savings of a lifetime can be given to the people you select and you can provide for the preservation of family heirlooms and for the continuation of a business.

#### Life Insurance

If your family is to receive the full benifit from your mile insurance program, insurance coverage should be regularly updated and coordinated with your plans for distributing property and other assets. Life insurance provides an estate with a ready source of cash required for the payment of estate taxes - and can eliminate the need to sell assets for payment of taxes.

#### **Protect Important Papers**

All important legal documents should be kept in a safety deposit box. Such documents would include a copy of your will (with the original kept with your attorncy), auto titles, marrlage papers, divorce papers, ither government recorded documents and bank account documents. An inventory list should be stored at home, with a duplicate in the deposit box and with your acorney. Stock certificates may be stored in a deposit box or with a broker.

Documents which can be easily replaced, such as insurance policies, educational records and cancelled checks, can be stored at home.

#### **Savings Bonds**

Savings bonds held ni the sole name of the decedent must generally be probated. Bonds may be transferred to a named survivor, subject to estate taxes. Consult a tax advisor, banker or an attornev. Record each gift of food and place a numbered sticker on the dishthat corresponds trthenumber, morttothedoora name.

#### **Stocks and Bonds**

Promptly contact issuing brokers. Stocks and bonds held solely in the decesdent's name must generally be probated: those owned jointly can be transferred to the surviving owner. Contact an attorney for consultation regarding tax problems.

#### **Retirement Accounts**

Consult employers or an attorney regarding the status of retirement plans and survivor benetits. If the decedent was paying into an Individual Retirement Account (IRA) - if self-employed or without an employer's pension plan - the amount in the account will go to the beneficiaries. Consult the agent for the IRA (Insurance agent, broker or bank) or an attorney.

#### Veteran's Benefits

Anvone who was a member of the military

at the time of death, or honorably discharged from the military, is subject to a number of benefits, which should be investigated.

- I. Pension to the widow and minor children.
- 2. Partial reimbursement of funeral expenses.
- 3. Burial in national cemetery.
- 4. Burial flag and grave marker.
- 5. Contact local office of Veteran's Administration for any additional benefits.

## Documentation required for benefits:

- 1. Copy of death certificate.
- 2. Veteran's discharged papers.
- 3. Itemized funeral bill receipt.
- 4. Marriage certiticate.
- 5. Birth certiticates of minor children

The survivor's information contained on the preceding pages is provided to make vou the survivor, aware of the various contingencies that could arise when a death occurs. We believe it will help you to proceed with complete confidence and assurance.

Record each gift of food and place a numbered sticker on the dish that corresponds to the number to the donors name.

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### Friends & Relatives To Notify Funeral

	DATE RECEIVED		
NAME	PHONE	E-MAIL	
-			

BEARERS: (Including honorary but not professional) Include a message thanks for their time and services on an Acknowledgment Folder.

Thank you for vour kindness in acting as a Bearer for Father. We asked you because vou were one of his closest friends.

LETTERS: Replies may be short and written on an Acknowledgment Folder.

Thank vou for vour kind words of sympathv . . . it is so nice to have friends like vou.

FLOWERS: A personal message may be written on the Acknowledgment Folder.

The roses you sent for dad were beautiful. .

FLOWERS RECEIVED FROM AN ORGANIZATION: Send an Acknowledgment to the leader of the group and include in the message reference to the other members.

The flowers sent by the members of the East Side Gun Club were beautiful and greatly appreciated.

If the members have their names on the floral card, an acknowledgment (with-out a personal message) is sent to each name on the card.

FLOWERS RECEIVED FROM AN UNORGANIZED GROUP: When a group of neighbors, employees. etc., send flowers an Acknowledgment to each name on the card is sufficient.

FRIENDS WHO VOLUNTEER CARS AND SERVICES: A personal note on an Acknowledgment is correct.

- » CAR: Thank you, Bob, for the use of your car. It was greatly appreciated.
- » SERVICE: You were so kind to stay with Mother after the funeral and helping her through that first evening alone.
- » FOOD: The apple pie you sent to the house was delicious; thanks again for your thoughtfulness.



No longer are personal letters expected in return for expressions of sympathy. . . in most cases a signed Acknowledgment Folder is sufficient to say "Thanks" for flowers, Mass cards, Sympathy cards and personal services.

Acknowledgments are usually sent within ten days or two weeks following the funeral

If a more personal touch is desired a few words can be written on the Acknowledgment Folder with reference to flowers, letters of condolence or other services that were rendered. These words make the recipient feel that one's thanks are as personal as if they had been expressed verbally.

We hope the following suggestions will prove helpful in handling the various expressions of sympathy the family receives during bereavement.

The notes printed below in italics a re only suggested copy.

They may be changed to fit your situation.

CLERGY: Send a personal note thanking them for their spiritual help. If an honorarium or offering is sent it shold be sent separately from the note to the clevrgyman.

- » Dear Mr.Smith: My husband and I thank you for the consolation you gave us during this tryingt ime. The beauty of the services you conducted will help us tremendously:
- » Dear Father Quinn: Thank you for the consolation you gave us and for your continuing prayers.
- » or: Dear Father Smith or Dear Dr. Smith. But NOT Dear Reverend or Dear Rev. Smith

## Friends OTho Assisted Before, During, and After the Paneral

	DATE RECEIVED	
NAME	PHONE	E-MAIL
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Friends Who Assisted Before, During, and After the Funeral

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NAME	ASSISTANCE RECEIVED	DATE THANK YOU SENT

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# Floral Tributes Received at Home

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# Memorial Gift Contributors

NAME & ADDRESS	CHURCH CHARITY OR FUND	THANK YOU SENT
Name Address		

# Memorial Gift Contributors

NAME & ADDRESS	CHURCH CHARITY OR FUND	DATE THANK YOU SENT
Name Address		



At Turrentine-Jackson-Morrow, it's respecting the hard work and dedication that have built a foundation of trust and commitment second to none. With roots that run deep in our communities, we value the past while moving into the future. We are committed to remaining the premier provider of funeral care throughout North Texas.