

Template: My Funeral Financial Plan

A Guide for My Executor

This document summarises the financial arrangements I have made to cover the costs of my funeral. Please use these funds to carry out the wishes I have detailed in my 'My Funeral Wishes' guide.

My Full Name: _____ **Date Prepared:** _____

Section 1: Estimated Budget

Based on my wishes, I have estimated the total cost of my funeral to be approximately:

\$ _____

Section 2: Funding Method

I have set aside funds using the following method. The relevant documents and contact information can be found as detailed below.

(Please tick and complete the one that applies)

[] 1. Pre-paid Funeral Plan

- **Funeral Director:** _____
- **Address / Phone:** _____
- **Contract / Plan Number:** _____
- **Location of Documents:** _____
- **Note: This plan covers the following specified services:** _____

[] 2. Funeral Bond

- **Bond Provider:** _____
- **Policy / Investment Number:** _____
- **Contact Phone:** _____
- **Location of Documents:** _____

[] 3. Dedicated Savings Account

- Bank / Financial Institution: _____
- Account Name: _____
- BSB & Account Number: _____
- Location of Bank Statements / Details: _____

[] 4. Funeral Insurance

- Insurance Company: _____
- Policy Number: _____
- Contact Phone: _____
- Location of Policy Documents: _____

[] 5. Other (*e.g., Funds to be paid from my general estate*)

- Details:

Signed: _____

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