



Schmidt & Bartelt
FUNERAL & CREMATION SERVICES

Biographical Record Guide

Date: _____ Phone: _____

First Name: _____ Middle Name: _____

Last Name: _____

Residence

Address: _____

City: _____ State: _____ Zip: _____

Birth Information

Birth Date: _____ Race: _____

City of Birth: _____ State of Birth: _____

Father's Name: _____

Mother's Full Maiden Name: _____

Citizen/Country: _____ Hispanic Origin: Yes No

If yes, specify Cuban, Mexican, etc.: _____

Education

Elementary (Years): _____ Secondary (Years): _____ College (Years): _____

Marital Status: M D M S W Sex: _____

To: _____ Date: _____ Place: _____ Death Date: _____

To: _____ Date: _____ Place: _____ Death Date: _____

Work Information

Occupation: _____ Social Security Number: _____

Kind of Business: _____

Employer: _____

Position Held: _____

Years with Company: _____

Retired Since: _____

Church, Lodge and Club Associations

Church Membership: _____

Lodges and Clubs/Offices Held: _____

Military Information

Entered Service: _____ Date: _____

Separated From Service: _____ Date: _____

Grade/Rank: _____

Branch of Service: _____ V.A.C. #: _____

Served With: _____ Service Number: _____

Service Instructions & Information

Place of Service:

Church:

Funeral Home:

Graveside:

Cemetery Chapel:

Other:

Clergyman (1):

Or (2):

Organist:

Vocalist:

Special Music or Hymns:

Favorite Bible Passages, Quotations, Poetry, etc.:

Casket Bearers (if available):

Flower Requests:

Memorial Donations:

Cemetery

Name of Cemetery:

Location, City:

Contact:

Grave Description, Section:

Lot Number:

Space:

Marker Installed?

Purchased from:

List any special clothing to be used and who to contact:

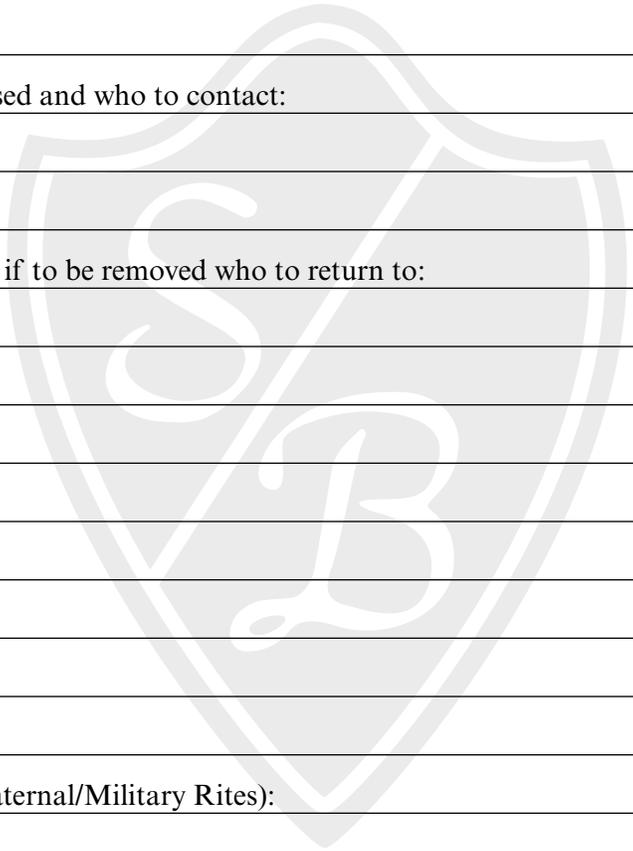
List any jewelry to be worn, and if to be removed who to return to:

Hairdresser:

Special Instructions:

Participation Organizations (Fraternal/Military Rites):

Funeral Home:



Survivors Information

The Death of a Loved One

The time immediately following the death of a loved one can be days of intense sorrow and emotional stress. During this time, the family must make a number of difficult decisions.

The Funeral Director can instruct and guide the family through the difficult problems of this trying time—and with their knowledge and experience, they can sympathetically relieve the family of needless concerns.

The Funeral Director handles the details associated with the death certificate and the burial permit. They can obtain additional copies of the death certificate, which may be required for settling claims.

Social Security

Claims should be filed within the month of death or the following month at the nearest Social Security Administration office. Claims for the lump sum death benefit must be filed within two years after death or benefits will not be honored. There is no charge for the Administration's assistance in the filing of claim papers.

The Social Security Administration requires the following information:

- Certified copy of death certificate or Statement of Death (form SSA 721)
- Deceased's employment record for the past year (W-2 form)
- Personal income tax returns (if self-employed)
- If married, marriage certificate
- Deceased's Social Security card number
- Birth certificates of minor children (under 18)
- Proof of age if over 60 (birth certificate or religious record recorded before age 5)

Note: Consult your local Administration office about other proofs, which may be acceptable.

Inquire about the following benefits:

- Lump sum death payment to surviving spouse or son or daughter entitled to benefits
- Benefits to widow/widower over 60
- Benefits to widowed with dependent children
- Benefits to deceased's minor children
- Benefits to disabled widow/widower age 50-60
- Very rare, but if no widow or children, benefits may be payable to surviving, dependent parent, if parent is receiving over 50% support from the deceased
- If a widow/widower, 60-64, is receiving disability benefits based on his/her own earnings, it may be possible to obtain benefits based on his/her deceased spouse's earnings
- Medicare
- Call (800) 772-1213 nationwide for help with questions about Social Security

Insurance

Contact the agents of all insuring companies as soon as possible. Agents will supply the necessary claim forms.

All policies should be closely examined with agents—including lapsed policies to check for any extended coverage. Any survivors' life insurance policies, which name the deceased as a beneficiary, should be changed.

Bank Accounts

Consult an attorney or your bank to answer any specific questions. A bank account solely in the deceased's name may require probate action or a consent to transfer from a government agency. Some banks may permit a release from smaller accounts for the payment of funeral expenses. Consult an attorney concerning the legalities of a survivor withdrawing from a joint account.

Real Estate

Real estate jointly held by a husband and wife is transferred to the surviving spouse. The services of an attorney—as in all real estate matters—are advisable.

Property, which is solely in the deceased's name, or owned jointly by the deceased and a party other than the surviving spouse, may require probate action whether or not a will exists.

Automobile

Any titled, automotive vehicle, such as a car, truck or recreational vehicle, becomes a part of the estate when the deceased is the sole owner.

For information regarding the transfer of title, contact the local license branch bureau or an attorney.

Safety Deposit Box

When a death occurs, a safety deposit box provides the tight security the name implies. Regardless of whether a safety deposit box is held in the deceased's name, or jointly, the box may be sealed until an official takes inventory of the contents. Consult the bank and an attorney regarding legal procedures.

Savings Bonds

Savings bonds held in the sole name of the deceased must generally be probated. Bonds may be transferred to a named survivor, subject to estate taxes. Consult an attorney for consultation regarding tax problems.

Stocks and Bonds

Promptly contact issuing brokers. Stocks and bonds held solely in the deceased's name must generally be probated; those owned jointly can be transferred to the surviving owner. Consult a tax advisor, banker or an attorney.

Retirement Accounts

Consult employers or an attorney regarding the status of retirement plans and survivor benefits.

If the deceased 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

Anyone 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.

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

Documentation required for benefits:

- Copy of death certificate
- Veteran's discharge papers
- Itemized funeral bill receipt
- Marriage certificate
- Birth certificates of minor children

The survivor's information contained on the preceding pages is provided to make you, 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.

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 one's 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 an individual who knows that his or her wishes will be followed. Consult the Funeral Director of your choice for more information and guidance in funeral prearrangement.

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 your 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 in taxes—and your survivors will receive more of your hard-earned estate—if you PLAN.

Wills

Estate taxes can be reduced significantly if the deceased 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 benefit from your life 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 attorney), auto titles, marriage papers, divorce papers, other 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 attorney.

To best serve and assist you with any questions you may have, or for directions, please contact the Schmidt & Bartelt location nearest you. Or visit us online at SchmidtAndBartelt.com.

Menomonee Falls
(262) 251-3630

Mequon
(262) 241-8085

Mukwonago
(262) 363-7126

Oconomowoc
(262) 567-4459

Sussex
(262) 246-4774

Wauwatosa
(414) 774-5010



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