

St. Mark's  
Lutheran Church

*"Celebrating My Life and Resurrection"*



## Funeral / Memorial Service Worksheet

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

I wish the following to guide the planning of the worship service:

I would prefer:  Cremation  Funeral (casket present)  Memorial Service

Location of Service:  Church \_\_\_\_\_

Funeral Home \_\_\_\_\_

Graveside Service:  Yes  No

Holy Communion:  Yes  No

Congregational Hymns: 1. \_\_\_\_\_

2. \_\_\_\_\_

Others: \_\_\_\_\_

Other Music (organ or solo): \_\_\_\_\_

Bible Readings: 1. \_\_\_\_\_

2. \_\_\_\_\_

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

Memorial Gifts may be made to: \_\_\_\_\_

\_\_\_\_\_

Do you wish pallbearers:  Yes  No

Suggested names: \_\_\_\_\_

St. Mark's Lutheran Church  
1111 O'Farrell Street  
San Francisco, CA 94109

Phone: 415.928.7770  
Fax: 415.928.8534  
Website: [www.stmarks-sf.org](http://www.stmarks-sf.org)

# Funeral / Memorial Service Worksheet, page 2



## Biographical Information

Birth date: \_\_\_\_\_ Birthplace: \_\_\_\_\_

Mother: \_\_\_\_\_ Father: \_\_\_\_\_

Baptism date: \_\_\_\_\_ Baptism place: \_\_\_\_\_

Confirmation date: \_\_\_\_\_ Confirmation place: \_\_\_\_\_

Significant Events/Relationships: \_\_\_\_\_

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Activities/Groups in the congregation: \_\_\_\_\_

\_\_\_\_\_ Military: \_\_\_\_\_

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

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

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

Hobbies/Interests: \_\_\_\_\_

Family to contact in case of emergency: \_\_\_\_\_

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

*A copy of this worksheet is on file at St. Mark's Church*     Yes     No

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## Funeral / Memorial Service Worksheet, page 3



### Checklist and Information Request Form

I have completed and have on file an up-to-date Will or Trust Instrument, valid in California.

Yes                       No                       *I would like more information about this.*

I have completed a Living Will, declaring my intentions regarding the use of life support measures should I be incapacitated without hope of recovery.

Yes                       No                       *I would like more information about this.*

I have adequate life insurance coverage, and information regarding this is available to my survivors.

Yes                       No

I have considered naming the church or another charitable institution as an alternate beneficiary or primary beneficiary to a life insurance policy.

Yes                       No                       *I would like more information about this.*

I have provided for a Durable Power of Attorney for Health Care or for Financial Matters should I become incapacitated.

Yes                       No                       *I would like more information about this.*

Information regarding such matters as my bank accounts, investments, insurance policies, safety deposit box, etc. would be immediately accessible to my survivors.

Yes                       No

In providing for disposal of my accumulated wealth, I have considered the most advantageous ways to remember my church and other charitable causes.

Yes                       No

I have expressed wishes regarding a funeral or memorial service upon my death, and these are known to my loved ones and to my pastor.

Yes                       No

I would like to make an appointment with Pastor Ekdale to discuss any of the above.

Yes                       No

Best time to meet:                       Day                       Evening                       Saturday

If you wish, you may return this checklist to the church office to request more information.

Thank you for taking time to think about this important matter.

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**St. Mark's Heritage Society**

The **Heritage Society**, founded in the centennial year of the church building, exists to thank and honor all those who have made a planned gift to St. Mark's, and to encourage others to do the same.

An example of such a gift would be the naming of St. Mark's in your will or trust or making St. Mark's the beneficiary of your life insurance or annuity contract. This kind of giving creates a legacy for the future. All planned gifts for St. Mark's, unless otherwise designated, go to St. Mark's Endowment Fund to make future ministry possible.

If you would like more information about the **Heritage Society**, or would like to register for membership, please speak with Pastor Ekdale or with the Chair of the Stewardship Committee.

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### Letter of Last Instruction

Everyone with family responsibilities should have a will. If you are wise, however, you will do even more. You should give your lawyer, your personal representative, or your spouse a letter of last instructions, which is separate from your will. This letter should be available to your survivors at the time of your death and should include the following:

1. Names, addresses, and telephone numbers of those to be notified on your death. (This should be kept up-to-date.)
2. Instructions for your funeral and burial, or cremation and memorial service if desired.
3. Location of your will.
4. Location of your safe deposit box, and its key, and a list of its contents.
5. Location of your essential personal papers, including:
  - birth or baptismal certificates
  - marriage certificate, dissolution or divorce records
  - papers for adopted children
  - naturalization or citizenship papers
  - social security card and records (for possible benefits)
  - military service records (for possible benefits)
6. Location of life, health and property insurance policies; also burial instructions and notation if prepaid.
7. Location of papers for pension or retirement plans and individual annuities.
8. Location of membership certificates in unions, lodges, or fraternal organizations which provide death or cemetery benefits.
9. List of personal and real property you own, including:
  - checking and savings accounts and location of passbooks or certificates for these
  - all real property and location of mortgages, deeds, and other records
  - stocks, bonds, or other securities
  - business property such as livestock and equipment, and location of titles or other records
10. Location of signed original copies of list or separate writing of how you want your tangible personal property distributed after your death.
11. Location of your income tax returns and supporting records.
12. Location of all credit cards, and a list of the numbers and addresses of the companies.

From "Letter of Last Instructions" by Marsha A. Goetting, Family Economics Specialist and Raeann Pourroy, Pondera County Extension Agent of Montana State University.

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## Funeral / Memorial Service Worksheet, page 6

### Including St. Mark's Lutheran Church in your Will



Thank you for your interest in including St. Mark's Lutheran Church in your estate planning documentation.

The official references to St. Mark's are as follows:

Name of Corporation: St. Mark's Lutheran Church  
Corporate Tax ID number: 94-1418294  
State of Incorporation: California, 1849

Address: St. Mark's Lutheran Church  
1111 O'Farrell Street  
San Francisco, CA 94109

Telephone: 415.928.7770  
Facsimile: 415.928.8534  
Website: [www.stmarks-sf.org](http://www.stmarks-sf.org)

Parent Church Body: Evangelical Lutheran Church in America  
Division for Ministry  
8765 West Higgins Road  
Chicago, IL 60631  
800.638.3522

If you, or your legal counsel, have further questions, please contact us at 415.928.7770.



If you would like to include Martin Luther Tower in your estate planning documentation, please contact Jon Moeller at [jon\\_moeller@hotmail.com](mailto:jon_moeller@hotmail.com).

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## Funeral / Memorial Service Worksheet, page 8

### Including Pacific Lutheran Theological Seminary in your Will



Thank you for your interest in including Pacific Lutheran Theological Seminary (PLTS) in your estate planning documentation.

The official references to PLTS are as follows:

Name of Corporation: Pacific Lutheran Theological Seminary  
Corporate Tax ID number: 9413846845  
State of Incorporation: California, 1950

Address: Pacific Lutheran Theological Seminary  
2770 Marin Avenue  
Berkeley, CA 94708-1597

Telephone: 510.524.5264  
Facsimile: 510.524.2408  
Internet Web Site [www.plts.edu](http://www.plts.edu)

Parent Church Body: Evangelical Lutheran Church in America  
Division for Ministry  
8765 West Higgins Road  
Chicago, IL 60631  
800.638.3522

If you, or your legal counsel, have further questions, please contact me or Jean Haddock at the PLTS Office of Seminary Relations, at 510.559.2735, or Toll Free: 800.235.7587

Most sincerely,

Jack Niemi  
Vice President of Development  
[jniemi@plts.edu](mailto:jniemi@plts.edu)  
Pacific Lutheran Theological Seminary  
2770 Marin Avenue  
Berkeley, CA 94708  
800.235.7587  
[www.plts.edu](http://www.plts.edu)

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**Contacts to Assist You in  
Your Financial Estate Planning**

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