

LEAL FUNERAL HOME

Pre-Planning Workbook

A Personal Guide to Honoring Your Wishes

"With You Every Step of The Way"

Leal Funeral Home

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(713) 532-6939

lealfuneralhome.com

A Note From Our Family to Yours

Thank you for opening this workbook. The fact that you are taking time to think about pre-planning is a remarkable act of love — one of the most thoughtful gifts you can give the people you care about most.

Pre-planning is not about preparing to leave. It is about making sure that when the time comes, your family doesn't have to make hard decisions in their hardest moments. It allows them to grieve fully, knowing your wishes are clear and that you have already thought of everything they would have to figure out alone.

This workbook is yours. Fill it out at your own pace. Skip what doesn't apply, return to sections later, write what feels right. There is no deadline and no obligation — this is a personal document, not a contract.

When you have questions, want to talk through an option, or are ready to formalize any of these wishes, we are here. Call us at (713) 532-6939 anytime. Our team speaks both English and Spanish, and our consultations are always free.

We are honored that you have trusted us with this conversation.

With care,
The Leal Family

Section 1 — Personal Information

Keep this workbook in a secure place — it contains personal information.

Full legal name: _____

Preferred / familiar name: _____

Date of birth: _____

Place of birth: _____

Social Security Number: _____

Current address: _____

City, State, ZIP: _____

Marital status: _____

Spouse / partner name: _____

Occupation: _____

Employer: _____

US Military Service

Did you serve? (Yes / No): _____

Branch of service: _____

Service dates: _____

Rank at discharge: _____

DD-214 location: _____

Section 2 — Family & Important Contacts

When the time comes, this list helps your family know who to call first.

Spouse or Partner

Name: _____

Phone: _____

Children

Name / Phone: _____

Name / Phone: _____

Name / Phone: _____

Siblings

Name / Phone: _____

Name / Phone: _____

Name / Phone: _____

Other Family / Friends to Notify

Name / Relationship / Phone: _____

Name / Relationship / Phone: _____

Name / Relationship / Phone: _____

Estate & Legal

Executor of estate (name, phone): _____

Attorney (name, firm, phone): _____

Financial advisor (name, firm, phone): _____

Section 3 — Service Type & Disposition

Burial or Cremation?

Both burial and cremation are honored, dignified options. Our team can guide you through the differences in cost, service style, and tradition. There is no wrong choice — only the choice that feels right for you and your family.

- Traditional burial
- Cremation
- Undecided — open to discussion with family / Leal team

If Burial

Cemetery preference (and section, if known): _____

Grave plot, mausoleum, or other: _____

Burial garments (regular clothing or funeral garment): _____

Casket material (wood, metal, eco-friendly): _____

Casket color: _____

Casket interior preference (silk, velvet, etc.): _____

Section 3 – Service Type & Disposition (continued)

If Cremation

Urn preference (material, design, family heirloom?): _____

Where would you like your ashes?

- Kept by family
- Scattered (location below)
- Buried at cemetery
- Placed in a niche / columbarium
- Other (describe below)

Religious / Spiritual / Secular Preference

Tradition or denomination: _____

Officiant or clergy preference (if any): _____

If Burial – Service Style

- Open casket
- Closed casket
- Family viewing only

Embalming

- Embalming requested
- No embalming (refrigeration only)
- Defer to family / officiant

Section 4 — Service Details

Type of Service

- Traditional funeral
- Memorial service (no body present)
- Graveside service only
- Celebration of life
- No formal service

Service Location

- Leal Funeral Home chapel
 - Place of worship (specify below)
 - Outdoor / graveside
 - Family home
 - Other (specify below)
-

Timing

Timing preference (e.g., within 3 days, after travel): _____

Music & Readings

Song or hymn 1: _____

Song or hymn 2: _____

Song or hymn 3: _____

Reading, scripture, or poem 1: _____

Reading, scripture, or poem 2: _____

Reading, scripture, or poem 3: _____

Section 4 – Service Details (continued)

Eulogy

Who would you like to deliver the eulogy?: _____

Phone / contact: _____

Alternate (in case primary cannot): _____

Pallbearers

1.: _____

2.: _____

3.: _____

4.: _____

5.: _____

6.: _____

Photographs

Preferred photo to display (description, location): _____

Other photos to include: _____

Flowers or Donations

Flowers welcome

In lieu of flowers, donations to (specify below)

Charity / cause name and address: _____

Section 5 — Obituary Worksheet

Pre-write what you'd like remembered. Take your time — this can be a meaningful exercise.

Born in: _____

Education: _____

Career Highlights

Marriages & Family

Hobbies & Passions

Accomplishments You Are Most Proud Of

Organizations & Communities

A Personal Message To Leave Behind

Section 6 — Special Wishes & Personal Touches

Items to be With You or On Display

Wedding ring, military medals, a favorite book, a quilt, a photo — anything meaningful.

Reception / Gathering

Food preferences: _____

Beverage preferences: _____

Location: _____

Dress Code

- Formal
- Casual
- Bright colors / "wear what you love"
- Specific request:

Cultural, Religious, or Family Traditions to Honor

Language Preference

Leal offers fully bilingual services in English and Spanish.

- English
- Spanish
- Bilingual

Other Wishes

Section 7 — Important Documents Checklist

Tell your family where each document lives. Many delays after a loss come from missing paperwork.

-
- Birth certificate *Located at:* _____
 - Social Security card *Located at:* _____
 - Marriage certificate / divorce decree *Located at:* _____
 - Military DD-214 (for veterans benefits) *Located at:* _____
 - Will and / or trust *Located at:* _____
 - Power of attorney (medical and financial) *Located at:* _____
 - Life insurance policies (carrier + policy #s) *Located at:* _____
 - Pension / 401(k) statements *Located at:* _____
 - Property deeds *Located at:* _____
 - Vehicle titles *Located at:* _____
 - Birth certificates of dependents *Located at:* _____
 - Letter of intent / personal letter to family *Located at:* _____

Section 8 — Financial Pre-Planning

Pre-paying funeral arrangements can lock in today's prices and protect your family from rising costs and difficult financial decisions during grief. In Texas, pre-need funeral contracts are governed by Texas Finance Code Section 154 and regulated by the state to protect consumers.

Three common ways to pre-fund:

1. Pre-Need Contract

A contract with the funeral home that locks in service prices today. The funds are held in a state-regulated trust or insurance product. Fully refundable in many cases until services are rendered.

2. Final Expense Insurance

A small life insurance policy specifically designed to cover funeral and burial costs. Pays out to a designated beneficiary or directly to the funeral home.

3. Payable-on-Death (POD) Account or Trust

A bank account or trust that transfers directly to a named beneficiary upon death — no probate required. Beneficiary uses the funds for arrangements.

We recommend discussing these options with both your family and a Leal director. There is no obligation — just clarity.

Texas Pre-paid Funeral Contract regulator: prepaidfunerals.texas.gov

Section 9 — Veterans Benefits

If you served honorably in the US Armed Forces, you and in many cases your spouse are eligible for benefits at no cost — but they require a DD-214 to claim. Knowing where this document is can save your family weeks of paperwork.

Benefits typically available:

- VA burial allowance (toward burial and plot expenses)
- Military funeral honors — rifle salute, flag presentation, taps
- Free burial in a national or state veterans cemetery
- Government-furnished headstone or grave marker
- Presidential Memorial Certificate signed by the President
- US flag for the casket / display

Our team coordinates these benefits at no additional charge. Bring or locate your DD-214 and we will handle the paperwork.

Required: DD-214. Replacement copies can be requested from the National Personnel Records Center.

To start a benefits review:

Call (713) 532-6939 — we will guide you and your family through every step.

Next Steps

You've done the hardest part. Here is what comes next.

1. Review With Your Family

Tell at least one trusted person where this workbook is stored. They will be the one to find it when it matters.

2. Schedule a Free Consultation

When you are ready, sit down with a Leal director — in our office, at your home, or by phone. There is no obligation, no pressure, and no charge for the conversation. We will help you turn these wishes into a clear, documented plan.

3. Reach Out Anytime

Phone: (713) 532-6939

Address: 11123 Katy Fwy, Houston, TX 77079

Web: lealfuneralhome.com

4. Bilingual Services

Servicio completo disponible en español. Llámenos en cualquier momento al (713) 532-6939.

Thank you for trusting us with this conversation.

— The Leal Family