



SURVIVOR'S CHECKLISTS

WHAT TO DO WHEN A LOVED ONE DIES

Immediately Following:

- Contact the funeral home to get your immediate next steps.
- Alert immediate family members and close friends.
- Arrange for the care of any dependents.
- If the deceased had any pets, arrange for their immediate care.
- Locate «your» loved one's important documents:
 - Will
 - Birth certificate
 - Social Security card
 - Marriage license
 - Military discharge papers (DD-214)
 - Deed to burial property
 - Copy of funeral prearrangements (if made)
 - Life insurance policies
- Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
- If employed, contact the deceased's employer.
- Alert the executor of your loved one's will.
- If applicable, notify agent under Power of Attorney.
- Notify your attorney regarding the probate of the estate.
- Notify religious, fraternal, and civic organizations that your loved one was a member of.
- Arrange for the disposal of any perishables left in the deceased's home- such as food, refrigerated items, and existing refuse.
- Alert the Post Office to forward the deceased's mail.

Before you meet with the Funeral Director, please download and complete these forms. The two forms linked below represents the information you will be reviewing with your Funeral Director at your arrangement meeting. If you are able, please review and compile as much information as possible prior to the meeting, so your time can be used most efficiently. Thank you.

[Arrangement Meeting Form](#)

[Death Certificate Information](#)



Within One Month:

- Locate and/or obtain other important paperwork of the deceased that will be necessary for the settlement of their estate:**
 - At least 12 copies of the certified death certificates
 - Real estate deeds and titles
 - Stock certificates
 - Loan paperwork
 - Bank and retirement account statements
 - Last 4 years of tax returns
- Consult with an attorney about probate.
- Meet with an accountant to discuss estate taxes.
- File claims with life insurance companies.
- Contact the Social Security Administration and other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits.
- Notify registrar of Voters.
- If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc.
- Cancel deceased's prescriptions.
- The Department of Motor Vehicles should be contacted to cancel the deceased drivers license and transfer titles of all registered vehicles.
- If your loved one was a veteran, inquire about benefits that you may be entitled to through the VA.
- Contact the deceased's employer. Inquire about any 401 (k), pension, or company benefits that the decedent may be entitled to.
- Notify all 3 credit reporting agencies.
- Obtain a current copy of the deceased's credit report
- If the death was accidental, verify whether benefits are available on existing insurance policies.
- Check for any life insurance benefits available through existing credit card or loan accounts.
- File any outstanding claims for health insurance or Medicare benefits.
- Obtain copies of deceased's outstanding bills.
- Advise all creditors in writing that a death has occurred.
- Change ownership of assets and lines or credit.
- Update your Will (if applicable).
- Update beneficiaries on your life insurance policies, if necessary.
- Send acknowledgement cards towards significant gestures of kindness.