

In moments like these, it's important to take things one step at a time. It's okay to feel overwhelmed by all that needs to be done when settling your loved one's affairs. To help you navigate such a difficult time, use this checklist that outlines some of the most important tasks.

### Attend to immediate needs\*

- ☐ Determine organ donation preferences
- ☐ Notify the doctor or county coroner
- ☐ Notify family, friends and clergy (if applicable)
- ☐ Appoint caretaker of dependents and pets
- ☐ Obtain 10 to 20 certified copies of death certificate
- ☐ Locate any wills, trusts, powers of attorney and any other legal documents
- ☐ Call employers about benefits and pay
- ☐ Ask about life insurance
- ☐ Arrange for care of the home and car

### Plan funeral and services

- ☐ Look for a burial plan or directions about final arrangements
- ☐ Meet with funeral or service director
- ☐ Arrange for funeral, burial or cremation
- ☐ Prepare an obituary
- ☐ Contact military and membership organizations about benefits

### Notify of passing

- ☐ Current and/or previous employers
- ☐ Social Security Administration
- ☐ Medicare/Health insurance
- ☐ Mortgage company
- ☐ Organizations
- ☐ Post office – have mail held or forwarded
- ☐ Tax preparer
- ☐ Utility, phone, internet and cable companies – cancel services and subscriptions
- ☐ Veterans Affairs
- ☐ Local DMV – cancel driver's license
- ☐ Credit Bureaus
- ☐ Social Media accounts

### Secure important papers (after the funeral)

- ☐ Bills, loans and mortgage payments
- ☐ Wills or trusts
- ☐ Insurance policies
- ☐ Inventory of all assets and liabilities

### Contact advisors

- ☐ Attorney
- ☐ Accountant
- ☐ Insurance agent
- ☐ Financial professional

### Apply for benefits\*\*

- ☐ Life insurance proceeds
- ☐ Employer benefits
- ☐ Retirement plans
- ☐ Social Security benefits
- ☐ Veterans' benefits

### Change titles and ownership

- ☐ Automobiles
- ☐ Bank accounts
- ☐ Credit cards
- ☐ Home
- ☐ Insurance policies
- ☐ Safe deposit boxes
- ☐ Stocks, bonds and investments
- ☐ Wills or trusts

### Close or transfer

- ☐ Services (phone, cable, internet, etc.)
- ☐ Automatic subscriptions / memberships
- ☐ Online payment sources (PayPal, Venmo, etc.)
- ☐ Online publications

\*See to these tasks within first two weeks.

\*\*Plan to convert group insurance policies and joint accounts within 30 days.

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### Explore sources of income after a loss

- ☐ 401(k) / 403(b)
- ☐ Accidental death and dismemberment insurance (AD&D)
- ☐ Annuities, stocks, bonds and mutual funds
- ☐ Checking and savings accounts
- ☐ Disability benefits
- ☐ Individual retirement accounts (IRAs)
- ☐ Life insurance
- ☐ Pension
- ☐ Social Security benefits
- ☐ Union benefits
- ☐ Unpaid compensation and vacation time
- ☐ Veterans' benefits
- ☐ Workers' compensation benefits