

A Checklist of Tasks After the Death of a Family Member or Friend: Many people have suggested that it would be helpful to have a checklist to help them stay organized and determine what they may be faced with following the death of a loved one. We hope that these suggestions will be helpful to you.

General Information

Arrangements for the funeral and/or religious services can be made after you discuss your plans with family members. The funeral home will work with you in making the funeral arrangements. The funeral home probably will contact you to arrange a time for an appointment to work out the details. If you are a member of a church or synagogue, clergy may also assist you with these arrangements.

Things to do following a death:

- Contact other family members and close friends.
- Contact your church or synagogue (if you have one).
- Discuss the choice of a funeral home with close family.
- If you expect many phone calls, have a friend/neighbor answer the phone for you.
- If you need to notify a number of people, have a close friend help you make the phone calls.
- Notify the employer of the deceased.
- Notify the employers of household members.
- Notify children's schools.
- Contact your attorney who will be able to assist you with any legal issues.

Prior to Going to the Funeral Home

Take the following information to the funeral home with you. It is also helpful to have another family member or close friend go with you.

- Name of deceased (full name, as well as nickname or other names the person might have used).
- Date and place of birth of deceased.
- Social security number.
- Occupation.
- Mother & Father's names and places of birth (state/country)—required for death certificate
- If veteran, a copy of discharge papers.
- List of relatives and relationships.
- List of church, professional organizations, clubs, and other organizations in which membership was held.
- If you wish to have donations made to a charity in memory of your loved one, have the name and address of the organization.
- Make a list of individuals who might be available as pall bearers.
- You may also wish to bring clothing to the funeral home, along with a recent photograph for viewing and obituary.

After the Funeral

- Obtain duplicate copies of the death certificate (funeral home may be able to assist with this).
- Notify social security office (in some states funeral homes may be responsible for this task).
- Handle Medicare.
- Look into employment benefits.
- Notify life insurance companies.
- Contact health insurance companies to terminate policies.
- Notify mortgage companies and banks.
- Close credit card accounts.
- Notify credit reporting agencies.
- Cancel driver's license.
- Cancel email & website accounts.
- Cancel memberships in organizations.
- Contact tax preparer.

Grief Resources available 24/7 for all types of loss: www.caringconnectionseds.org