

## Other contacts to make or accounts to cancel

- Church/regular place of worship.
- Facebook and Twitter and LinkedIn accounts
- Other social media
- Internet accounts (Amazon, Ebay, etc.)
- Social groups to which your loved one belonged.
- Dentist and doctors
- Creditors – anyone to whom your loved one owed money.
- Debtors – anyone who owed your loved one money.

## Documents to collect and review

- Wills and Trusts.
- Safe Deposit Agreements and keys.
- Nuptial Agreements.
- Life Insurance.
- Pension-retirement benefits
- Old tax returns
- Marriage, birth and death certificates.
- Divorce documentation.
- Computer records regarding books of a business or personal assets.
- Bank statements, checkbooks, similar documents, including online investments
- Titles to motor vehicles.
- Leases.
- Any documentation of business ownership or business interest.
- Health Insurance, make claims for the final illness.
- Unpaid bills.

## Caution

Watch out for people who prey upon a family's loved ones. There are people who look for death notices and make unfounded claims against the deceased. Others may also attempt to burglarize the home during the funeral service since this is often publicized. Be cautious about such matters; have someone stay at the home during the funeral service and do not easily accept the claims of unknown individuals that lack documentation.

**This checklist is provided to you by  
this Funeral Home  
and TheEulogyWriters.com**

*Honoring your loved one telling the story of their life.*

## Because We Care



You have our deepest sympathy at the loss of your loved one.

In the midst of the difficulties of these days, there are a number of things that you will need to tend to. We have provided this checklist to help alleviate some of the stress and uncertainty when you have lost a loved one.

Since you have already begun to make funeral or memorial service arrangements with us, you've made a great first step. Here's what's next:

## To Do Today

- Notify family and friends. *You may want to consider having family members contact others to save yourself some time on the phone during this stressful period.*
- Look for instructions which your loved one may have left regarding preferences for funeral and burial arrangements.
- Determine if your loved one is entitled to a military honor guard or some other memorial honor. Contact the appropriate office.
- Contact a eulogy writer if a family member would like to speak at the service (many people don't have the time nor ability to write a good eulogy). We recommend [TheEulogyWriters.com](http://TheEulogyWriters.com) They write great eulogies within 24 hours. Sensitive and beautiful and complete.
- Meet with the clergy or other officiant to construct the service you want.

## Soon After the Funeral or Memorial Service

- Contact the Social Security Administration and any other government agencies or benefit program that may have been making payments to your loved one.
- Review your loved one's financial affairs and look for any estate planning documents.

- If there is a Will, take the Will to the appropriate County or City office to have it accepted for probate. If there is no Will and there are sufficient assets to probate, then the Court will appoint an administrator and the assets of your loved one will be distributed according to state law.
- If you are the Personal Representative or Successor Trustee of a Trust, try to make a list of the assets owned by your loved one or the Trust, in order that they can be administered and distributed according to his or her wishes.
- Open a bank account for the estate of your loved one. *This should be done early on and all receipts and disbursements should be recorded in that bank account in order to account properly for the assets of your loved one and the expenses of administration.*
- Make an inventory of household goods, personal belongings and the like, in order that they can be accounted for and properly distributed.
- Look for insurance policies or annuities which may continue for other family members and other assets *Contact the Insurer with respect to any current policies or annuities.*
- Try to assemble the deeds of your loved one to see what real estate, if any, is owned. *If real estate is owned in more than one state, special proceedings, called "ancillary administrations," may be needed in each state.*
- Determine if your loved one owned any securities, stocks, bonds, mutual funds, etc.
- If your loved one controlled or was a principal person in a business, it may be necessary to check to see if there are Buy-Sell Agreements under which the interest of your loved one would be purchased by the business entity or other business owners.
- If, after the appointment of a Personal Representative, a bank account or safe deposit box is found, then the assets in the bank account or safe deposit box need to be distributed according to the wishes of your loved one.
- If your loved one was indebted to anyone, then the creditor needs to be paid *If the creditors are not paid and they make a claim against the estate after all of the assets are distributed, the Personal Representative may be in trouble and held personally liable for the debt.*
- As part of the probate process, all family members within a certain degree of kinship must be contacted, whether or not they receive assets from the Estate.

- The income taxes of your loved one for the year of death need to be filed, and any tax due must be paid *If there is a surviving spouse, the surviving spouse and Decedent can file a joint return for the year of death.*
- If there are minor children and the Will provides for a guardian, then the guardian needs to be informed and the children need to be placed in the care of the guardian *If there are minor children and no guardian is appointed, or if there is no Will, then the Court must appoint a guardian.*
- If there is real estate that is insured, the Personal Representative should make sure that the insurance policies on the properties of your loved one are maintained.
- If there is a surviving spouse, make sure veteran's benefits or other "joint and survivor" benefits are collected by the surviving spouse.

## Contacts to make at your earliest convenience

- The relevant tax office - city, state and IRS.
- Social Security Administration.
- Local authorities if your loved one paid city tax, had a parking permit, was issued with a permit for disabled parking, or received social services help, attended day care or similar.
- Identity and Passport Service, to return and cancel a passport.
- Car registration documents/change ownership.
- Financial institutions your loved one used - close accounts.
- Insurance companies – contents, car, travel, medical, homeowners, etc.
- Any other company with which your loved one may have had rental, hire, purchase or loan agreements.
- If your loved one was the first named on an insurance policy, make contact as early as possible to check that you (spouse) are still insured.
- Pension providers/life insurance companies.
- Mortgage provider.
- Credit card providers/store cards.
- Utilities companies
- Landlord or local authority if they rented a property.
- Any private organization/agency providing home help.
- The post office to redirect mail.
- Cable/internet companies with which your loved one had subscriptions.
- Clubs, trade unions, associations for cancellation and refunds.