



### **Things To Do Following the Funeral Service**

Mark each item as you complete this checklist:

1. \_\_\_\_\_ Certified copies of the death certificate received.
2. \_\_\_\_\_ Acknowledgement cards are written and sent.
3. \_\_\_\_\_ Meet with Attorney to commence probate proceeding. Provide attorney with a copy of the Will and Certified copy of the death certificate.
4. \_\_\_\_\_ Notify Insurance Companies and file claims when applicable.
  - Life Insurance
  - Medical, Health, Disability, Travel and Accident
  - Pension Benefits
  - Home Owners
5. \_\_\_\_\_ Employer of Deceased notified/Employer pension benefits changed.
6. \_\_\_\_\_ Car Insurance Changed (do this before #7)
7. \_\_\_\_\_ Vehicle Title Transferred. Take copy of deceased's will.
8. \_\_\_\_\_ Apply for appropriate benefits when applicable.
  - Social Security Benefits
  - Veteran's Burial and Survivor Benefits
  - Workman's Compensation Benefits
9. \_\_\_\_\_ Notify Stockbroker
  - Change ownership of joint or solely owned stocks.
  - Cancel any open orders arranged by the deceased.
10. \_\_\_\_\_ Notify Bank
  - Change all jointly held accounts and correct tax identification numbers (usually social security number).
  - Cancel direct deposit retirement benefit payments.
  - Re-establish title of safe deposit box.
  - Seek legal counsel before re-establishing mortgages, notes, etc.
  - Apply for any credit life insurance, which may exist.
11. \_\_\_\_\_ Credit Card companies notified.
12. \_\_\_\_\_ Appointments, made by the deceased, cancelled. Return any Medical Equipment to the store/agency.
13. \_\_\_\_\_ Notify Schools, Colleges, etc. about the death.
14. \_\_\_\_\_ Notify personal lists at home. (cards, magazines, etc.)
15. \_\_\_\_\_ Change beneficiary on your personal accounts, life insurance, etc.
16. \_\_\_\_\_ Cemetery Memorial
17. \_\_\_\_\_ Personal Pre-planning of funeral arrangements with the Funeral Home.
18. \_\_\_\_\_ Other\_\_\_\_\_.