

COPING WITH THE LOSS OF A LOVED ONE

Checklist



CONTACT:

- Funeral home
- Primary care physician
- Deceased's place of worship
- Close family and friends
- Deceased's current and past employers
- Associations, clubs, unions, and professional organizations
- Financial Advisor
- Insurance companies, including health, dental, life, disability, long-term care, automobile, and home insurers
- Attorney, if necessary
- Accountant
- Executor
- Trustee
- Service providers, such as housekeepers, landscapers, trash collectors
- Landlord
- Doctors, dentists, and other healthcare professionals
- Credit card companies
- U.S. Post Office
- Social Security Administration
- Veterans Administration
- U.S. Citizenship and Immigration Services (if not a U.S. citizen)
- State Department of Motor Vehicles
- Credit-reporting agencies

ARRANGE FOR:

- Funeral, cremation, or memorial services, if not prearranged
- Your bereavement leave
- Obituary
- Certified copies of death certificates
- Security for deceased's home and close relatives during the funeral
- Care for minors and dependent family members
- Care for pets

LOCATE:

- Estate documents (wills, trusts, and written preferences for final arrangements)
- Prior arrangement for an anatomical gift
- Prepaid funeral or cremation documents
- Deed to cemetery plot
- Safe deposit box, if any
- Deeds and titles of property
- Birth, marriage, divorce, prenuptial, child support, and military discharge documents
- Birth or adoption documents of children
- Brokerage and bank account statements and checkbooks
- Credit card statements
- Pension and retirement plan administrators
- Life insurance contracts, including policies through associations, employers, and banks
- Annuity contracts
- Business buy-sell agreements

Please note: Some items will be completed by the executor or personal representative in the course of opening the probate process.

NOTES:
