

✓ CHECKLIST ✓

Immediately following death, many activities must take place. To help you through the process, we have prepared a simple checklist.

- Send notes to acknowledge expressions of sympathy
- Obtain certified copies of death certificate
- Make copies of dated obituary notice
- Check contents of safe deposit box
- Notify bank/financial institutions
- Locate marriage certificate
- Locate birth certificates
- File for Social Security benefits
- File for Veteran's benefits
- Order cemetery memorial (e.g., marker, monument, niche plate, etc.)
- Compile a list of heirs, next-of-kin, and beneficiaries
- File for life insurance benefits, including credit life
- Review life insurance policy beneficiaries and make necessary changes
- File for fraternal, union, and association benefits
- File for employer/retirement benefits (e.g., IRA, 401ks, pension, etc.)
- Contact attorney to discuss possible estate filing
- Review your will or living trust
- Review/complete healthcare advance directives (e.g., living will, durable power of attorney, etc.)
- Pre-arranged funeral planning
- Review transfer of car title(s) into your name
- Review automobile insurance policy
- Contact creditors (list below)

- Secure health insurance
- Contact healthcare providers to update records (list below)

- Additional family needs (list below)

