

# 40+ THINGS TO DO AFTER A LOVED ONE DIES

Date	Items a Spouse, Family Member(s) or Executor Needs to Review and Act Upon (As Applicable)
	1. Make sure the person's organ donation wishes are followed.
	2. Contact funeral home <i>(if applicable, have prepaid funeral plans or life insurance information available)</i> .
	3. Contact clergy and/or church.
	4. Locate address book and notify family and friends <i>(by phone and/or e-mail)</i> .
	5. Place obituary(s).
	6. Contact Veterans Administration <i>(Military honors for funeral and death benefits)</i> . <a href="http://www.va.gov">www.va.gov</a>
	7. Conduct viewing and/or service(s).
	8. Order an adequate number of death certificates from the funeral home <i>(at least 10-15)</i> .
	9. Locate will, trusts, important papers/documents/statements/memos/deeds/titles.
	10. Review will, trust, estate, and probate information with executor and/or attorney <i>(identify attorney fees)</i> .
	11. Distribute personal possessions <i>(as recorded in this booklet, will, or estate papers)</i> .
	12. Write thank you notes for food, flowers, memorials, people who assisted in the service(s), etc.
	13. Notify employer or employer's HR department <i>(apply for any life insurance benefits, pension benefits, transfer any medical coverage into the name of the spouse)</i> .
	14. Notify life insurance companies and apply for benefits.
	15. Gather unpaid bills you find or that come in the mail. Organize the information for payment from the estate.
	16. Notify the Social Security Department and apply for benefits. 1-800-772-1213 <a href="http://www.ssa.gov">www.ssa.gov</a>
	17. Notify company(s) holding pension account(s) and apply for benefits.
	18. Notify any provider of income source(s) about the person's death.
	19. Notify company(s) holding annuity account(s).
	20. Notify the motor vehicle department and change titles for vehicles, boats, recreation vehicles.
	21. Notify stock brokerage houses and investment companies where the person had accounts.
	22. Notify motor vehicle departments.
	23. Notify the post office.
	24. Notify credit card companies <i>(apply for any possible life insurance benefits that might exist on the account)</i> .
	25. Notify bank(s) or credit union(s) and change account information.
	26. If applicable, reestablish title/ownership of Safe Deposit Box.
	27. Change all jointly held accounts, investments, mortgages.
	28. Get help going through a person's personal belongings—identify items you will keep, items you will give away to specific individuals, and items you will donate or have picked up (by a church, Christian organization or a local charity) for their use or resale.
	29. Distribute any memorial gifts or charitable gifts to church, ministries, missionaries or non-profit organizations.
	30. If applicable, apply for Veterans Administration benefits. <a href="http://www.va.gov">www.va.gov</a>
	31. Review bank records and cancel automatic withdrawals related specifically to the deceased.
	32. Notify any union, professional, religious, or fraternal organizations or associations to which the person belonged. Some groups will announce this to their membership. Also, check to see if there are any life insurance benefits the person may have had through their membership in these groups.
	33. Review mail and cancel subscriptions and reoccurring charges <i>(cell phone, etc.)</i> .
	34. Contact Medicare for possible assistance with the final medical bills, if the person was 65 or over.
	35. Finalize hospital bills, doctor bills, nursing home accounts.
	36. Notify any creditors and mortgage companies <i>(Note: See if any loans were insured. For example, the person may have had a home owner's insurance policy that pays off the mortgage at their death)</i> .
	37. Locate previous tax records. File federal and state taxes for the year the person passed away.
	38. Have executor transfer assets and inheritances to heirs and beneficiaries.
	39. If applicable, become part of a grief support group or identify someone(s) who can journey with you through the grieving and adjustment process.
	40. Have an autoresponder setup on a person's e-mail address. After several months, delete e-mail address.
	41. Give charitable gifts or establish scholarship accounts in loving memory of the person that passed away.
	42. Distribute any pictures, personal mementos, family heritage/legacy information to family, relatives, friends.
	43. Research if there is any unclaimed money sitting in insurance companies, banks, utility companies, stocks, etc., go to: <a href="http://www.missingmoney.com">www.missingmoney.com</a>