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## **A Checklist of Things to Do After a Person Dies**

Even with the best of planning, the time of actual death may be emotional. This is only natural. When a person is suffering from a loss of this type, remembering all that needs to be done may be difficult. There are undoubtedly a lot of things to do in the days and weeks following a loved one's passing. Here is a checklist to consider, and remember that not all of these will pertain to your specific situation and in the order you personally need to handle things:

### **IMMEDIATELY FOLLOWING THE DEATH, YOU SHOULD:**

- 1. Sit down and take a deep breath. Drink water and decide if you need to eat, reach out to a friend, sleep, partake in a spiritual practice, do what you need to settle in. It is okay to just be for a while.

### **THEN:**

- 2. Contact the funeral home or family member who will be taking care of your loved one.
- 3. Make calls for all methods of organ donation if this is applicable because time is of the essence.
- 4. Alert immediate family members and close friends.
- 5. Arrange for the care of any dependents or animals.
- 6. If decedent was employed, contact employer.

### **IN THE NEXT DAY OR SO:**

- 7. Start discussing burial/cremation/aqua dissolution/natural organic reduction/ burial at sea/funeral/memorial/celebration plans.
- 8. Compile the following information which will be needed to finalize the death certificate:
  - Deceased's first, middle, and last name  Deceased's Maiden Name (if applicable)
  - Deceased's Home Address  Deceased's Social Security Number  Deceased's Date of Birth
  - Deceased's Date of Death  Deceased's Age  Deceased's Gender  Race/Ethnicity

- Marital Status  Spouse's first and last name  Deceased's highest level of education
- Deceased's Occupation  Deceased's City and State of Birth  Deceased's Father's Name
- Mother's Name  Veteran Status

9. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).

10. Alert the executor of the will and life insurance beneficiary.

11. Arrange for the disposal of any perishables left in the deceased's home- such as food, refrigerated items, and existing refuse. And water plants!

12. Locate loved one's important documents:

- Will  Birth certificate  Social Security card  Marriage license  Military discharge papers (DD-214)  Deed to burial property  Copy of funeral prearrangements  Life insurance policies  Last Banking statement  Pensions  Stocks/Bonds  IRA investments

13. Alert the post office to forward the deceased's mail.

14. Notify attorney regarding the possible probate of the estate.

15. Write an obituary or memorial.

IN THE NEXT WEEK OR SO:

16. Notify religious, fraternal, and civic organizations that your loved one was a member of.

17. Access/close these accounts:  Credit cards  Cell phone  Student loans  Credit union  Safety deposit box  Car insurance  Monthly memberships  Apple ID  PayPal

18. Contact the Social Security Administration and other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits. (800) 772-1213. If the funeral home has been given your loved one's social security number, the funeral home has made an initial notice to the SSA to halt identity theft.

WITHIN ONE MONTH OF THE DEATH, YOU SHOULD:

19. Meet with an accountant to discuss estate taxes.

20. File claims with life insurance companies.

21. Consult with an attorney about probate.

22. Notify the Registrar of Voters.

- 23. If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc.
- 24. Cancel deceased's prescriptions.
- 25. Contact the Department of Motor Vehicles to cancel deceased's driver's license and transfer titles of all registered vehicles.
- 26. Remove loved ones from marketing and mailing lists.
- 27. Contact the deceased's employer. Inquire about any 401 (k), pension, or company benefits that the decedent may be entitled to.
- 28. Double check checking account to monitor any activity.
- 29. Obtain a current copy of the deceased's credit report.
- 30. If the death was accidental, verify whether benefits are available on existing insurance policies.
- 31. Check for any life insurance benefits available through existing credit card or loan accounts.
- 32. File any outstanding claims for health insurance or Medicare
- 33. Obtain copies of deceased's outstanding bills.
- 34. Locate and/or obtain other important paperwork of the necessary for the settlement of their estate:
  - Real estate deeds and titles  Stock certificates  Real estate titles  Loan paperwork
  - Bank and retirement account statements  Last 4 years of tax returns
- 35. Advise all creditors in writing that a death has occurred.
- 36. Change ownership of assets and lines of credit.
- 37. Update your will.
- 38. Update beneficiaries on your life insurance policies, if necessary.
- 39. Send acknowledgement cards for flowers, donations, food, and kindness. Also remember to thank pallbearers.
- 40. Organize and distribute decedent's personal belongings.

And breathe! And drink water! And know that you are doing the very best you can!