

Funeral Planning Survivor's Checklist

Organizing a funeral is never easy. This information will make this difficult time much easier for you and your family to get through. It will give you a well-structured plan to help you get through the challenging time after losing a loved one.

What To Do Immediately Following a Death

- Get a legal document of the death
- Check for any written instructions for the body disposition or funeral plans
- Notify funeral home
- Contact family, friends and coworkers
- Contact their employer to understand benefits
- Determine the executor of the estate
- Gather information for the obituary and contact newspapers
- Take security precautions at their home
- Forward mail and save important bills
- Cancel newspaper, magazine and online subscriptions
- Remove any jewelry from deceased

Planning the Funeral and Memorial Service

- Decide on place and time of funeral service
- Inquire about special religious services (if necessary)
- Choose a burial container
- Choose a burial site (find burial property documentation of ownership)
- Pick out clothing for the deceased (if necessary)
- Choose the prayers, poems or other readings
- Choose the special people to read eulogies and tell stories
- Pick the type of flowers and music
- Choose pallbearers
- Choose a charitable organization(s) to receive donations
- Order the funeral program
- Choose the memorial type and inscription
- Sign necessary papers for burial permit
- Decide on place for post-funeral reception (if applicable)
- Decide on food and drinks for post funeral reception (if applicable)
- Understanding your options for paying for the funeral
- Order thank you cards for flowers, donations, etc.

Bills & Services to be Paid

- Funeral director
- Family burial space
- Clergy
- Interment/burial services
- Florist
- Memorials
- Funeral services
- Transportation
- Refreshments
- Clothing
- Medicine and drugs
- Musicians
- Others (rent, mortgage, taxes)

Gather Important Documents

- Will
- Birth certificate
- Social Security card
- Military discharge papers
- Insurance policies (health, life, property)
- Automobile title
- Property deeds
- Mortgage
- Marriage license
- Income tax returns (last two years)
- Disability claims (if any)
- Retirement, pension and brokerage accounts
- Financial and bank statements

Things to Do After the Funeral

- Obtain 10–15 copies of the death certificate
- Contact your local Social Security Office
- Contact insurance companies
- Contact banks, mortgage companies, and financial advisors
- Contact Medicare
- Close credit card accounts and notify credit reporting agencies
- Cancel the driver's license
- Contact social media sites to close or memorialize accounts
- Send thank you cards for flowers, donations, etc.

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