

Funeral Planning Checklist

A helpful guide for what to do when a loved one passes. Not all steps may be necessary in every situation, but our goal is to help make this difficult time as easy as possible.

What To Do Immediately Following a Death

- Gather important documents
 - Will (if one exists)
 - Military discharge papers
 - Insurance policies (health, life, property)
 - Citizenship papers (if appropriate)
 - Automobile title
 - Property deeds
 - Marriage license, agreements
 - Income tax returns (past two years)
 - Disability claims (if any)
 - All documents necessary for deceased's taxes (ask an accountant)
 - Financial and bank statements
 - Retirement, pension and brokerage accounts
 - Debt records
 - Mortgage information
 - Business agreements (such as LLC or partnership agreements)
 - Bills (utilities, services, subscriptions)
- Get a legal document of the death (10-15 copies)
 - Ask doctors, nurses or emergency response team for help to obtain this
- Find out if they were an organ donor
 - May be indicated on driver's license or in living will
 - Let nearby hospital know as soon as you discover organ donor status
- Inform family, friends and co-workers
 - Leave contact information so they can get back in touch with you
- Contact a service to retrieve the body
 - Choose funeral home, cremation or body donation service based on wishes
 - Remove any valuable jewelry from the body.
- Contact an attorney to get access to will
 - Contact the attorney that drafted will or one that represents your loved one
 - If no will exists, contact an attorney that specializes in probate law
- Determine the Executor of the estate
 - Executor could be appointed by will or an attorney or by the state
 - Usually a family member or close loved one
 - Only the Executor can handle certain matters like cancelling accounts
- Contact their employer to understand benefits
 - You may have benefits available to you and other family members
 - If they were a military veteran, contact the Veteran's Administration

- Gather key information for the obituary and contact newspapers
 - Given name
 - Armed services number
 - Date and birthplace
 - Occupation and employer
 - Mother's maiden name and birthplace
 - Father's name and birthplace
 - Those who have preceded in death
 - Survivors and relationship to deceased
 - Hobbies, interests
 - Schools attended
- Take security precautions at the deceased's home
 - Appoint someone to stay there
 - Lock up and remove all important valuables and vehicles
- Forward mail and save important bills
 - Contact the post office to forward to an address that will be
 - Monitored for important bills and information
- Cancel newspaper, magazine, and online subscriptions

Planning the Funeral and Memorial Service

- Choose the venue
 - Funeral homes and religious institutions are most common places
 - Restaurants and event centers often offer affordable rooms or spaces for rent
 - Keep in mind your loved one's wishes
- If there is a burial
 - Choose a burial site and options (traditional casket, green funeral, crypt, etc.)
 - Pick a burial container (caskets, shrouds, etc.)
 - Pick out clothing for your loved one's body
 - Choose pallbearers, if needed
 - Order a funeral limousine, if needed
 - Sign necessary papers for burial permit
 - Choose the memorial type and inscription (headstones, plaques, etc.)
- If there is a cremation
 - Choose what will be done with the ashes/cremains (urn, interred in mausoleum, scattered, etc.)
 - Choose an urn, if there will be one
- Choose options for the funeral service and memorial celebration
 - Choose prayers, poems and readings to best celebrate the life of your loved one
 - Choose special people to read eulogies and tell stories
 - Pick the type of flowers
 - Choose music that celebrates and represents your loved one
 - Order funeral programs
 - Choose a charitable organization(s) to receive donations

- Choose options for a post-funeral reception
 - Choose food and music
 - Choose a location (restaurant, parks, home)
 - Rent or have tent available, if outdoor
- Other things to do before the funeral
 - Arrange care for infants or other minor children
 - Keep a list of callers, flower tributes and donations
 - Create a guest book for attendees
 - Provide lodging for out-of-town attendees
 - Prepare your home for family and friends
- Understand your options for paying for a funeral
 - Check to see if your loved one has set money aside for the funeral
 - Check if they pre-paid through a funeral home or a cremation company
 - Use crowdfunding sites like [gofundme.com](https://www.gofundme.com) or [youcaring.com](https://www.youcaring.com) for help

Things to Do After the Funeral

- Get 10-15 copies of the death certificate
- Contact banks, mortgage companies and financial advisors
 - Talk to each about how to handle your loved one's accounts
 - If there's a safe deposit box and you have no key, you may need a court order
- Contact insurance companies
 - If there's a life insurance policy, fill out claim form
 - For all other policies like car and homeowners insurance, stop the coverage
- Close credit card accounts and notify credit reporting agencies
 - Send death certificate to credit reporting agencies (Equifax, Experian and TransUnion) to reduce the risk of identity theft
- Cancel Driver's License
 - Notify the state to cancel your loved one's driver's license
- Contact social media sites to close or memorialize accounts
- Contact Social Security to apply for survivor benefits
 - Social Security Office: 1-800-772-1213 or [ssa.gov](https://www.ssa.gov) for information
 - Also handles Medicare benefits

Plan your own funeral and relieve the burden on your loved ones.

Let our easy, useful and inspiring tools to guide you through the whole process.



My Wonderful Life

Plan your funeral your way.

[mywonderfullife.com](https://www.mywonderfullife.com)