

# After the Loss of a Loved One:

## — A Checklist —

### Notify & Arrange

- ☐ Contact family & friends
- ☐ Arrange the funeral or memorial
- ☐ Obtain death certificates

### Secure Important Documents

- ☐ Locate will & legal papers
- ☐ Secure financial accounts
- ☐ Find insurance policies

### Take Care of Immediate Needs

- ☐ Secure property & pets
- ☐ Forward mail & cancel services
- ☐ Notify employer (if applicable)

### Handle Financial Matters

- ☐ Notify banks & credit cards
- ☐ Contact Social Security
- ☐ File for life insurance benefits

### Update Accounts & Benefits

- ☐ Change beneficiaries
- ☐ Update utilities & accounts
- ☐ Cancel subscriptions

### Take Care of Yourself

- ☐ Allow time to grieve
- ☐ Seek support & counseling
- ☐ Rest & take care of your health

### Plan for the Future

- ☐ Review or update your will
- ☐ Organize important documents
- ☐ Consider financial planning

Take Things One Step at a Time

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