

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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