



# 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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# After the Loss of a Loved One:

## A Detailed Checklist



### Immediate Steps

- ☐ Obtain legal pronouncement of death.
- ☐ Secure location by locking up the home and vehicle.
- ☐ Forward mail and cancel unwanted services.
- ☐ Arrange mail and cancel unwanted services.

### Notify & Arrange

- ☐ Contact family and friends.
- ☐ Notify employer (yours and the deceased's) to inform them of the death and benefits available.
- ☐ Arrange the funeral or memorial.
- ☐ Obtain several copies of death certificate.
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- ☐ Notify key organizations:
  - Social Security Administration
  - Financial institutions (banks, credit cards)
  - Insurance companies (health, life, etc.).
  - Utility providers (gas, electricity, phone, int, etc.)
  - Veteran's Affairs (if applicable).
  - Post office for mail forwarding

### Gather Important Documents

- ☐ Locate the will, living trust, and any advance healthcare directives.
- ☐ Secure other legal documents (marriage certificate, birth certificate, divorce decrees, military discharge papers, etc.)
- ☐ Gather all financial statements: bank accounts, investment accounts, retirement accounts, credit card statements.
- ☐ Find insurance policies: life, automotive, homeowner's.
- ☐ Keep track of loans, debts, and credit cards (mortgage, car loans, utilities)
- ☐ Collect tax returns, property deeds, car titles.

### Manage Financial Matters

- ☐ Notify banks and close or transfer accounts.
- ☐ Contact Social Security to discuss survivor benefits.
- ☐ File for life insurance benefits.
- ☐ Report the death to credit bureaus to avoid identity theft.
- ☐ Close or update credit cards and other accounts.
- ☐ Update beneficiaries (IRA, 401(k), insurance policies)
- ☐ Consider consulting a financial advisor.

### Take Care of Yourself

- ☐ Allow yourself time to grieve and heal.
- ☐ Consider joining a support group or speaking with a therapist.
- ☐ Take care of your physical health; eat well, rest and exercise gently.
- ☐ Lean on friends, family, and loved ones for support.
- ☐ Be patient with yourself and take things one step at a time.



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# After the Loss of a Loved One:

## Important Information



Fill out this page to keep all important information for your loved ones in one place. Enter as much detail as possible to help make things easier if you are no longer able to do so yourself.

### Personal Information

- ☐ Full Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_
- ☐ Social Security Number: \_\_\_\_\_ Address: \_\_\_\_\_
- ☐ Email: \_\_\_\_\_
- ☐ Phone Number: \_\_\_\_\_

### #1 Emergency Contacts

- ☐ Name: \_\_\_\_\_  
Relationship: \_\_\_\_\_  
Phone Number: \_\_\_\_\_
- ☐ Address: \_\_\_\_\_  
Email: \_\_\_\_\_  
Phone Number: \_\_\_\_\_

### Insurance Policies

- ☐ Company: \_\_\_\_\_
- ☐ Policy Number: \_\_\_\_\_
- ☐ Agent/Contact: \_\_\_\_\_

### Important Documents

- ☐ Will and Living Will \_\_\_\_\_
- ☐ Marriage or Divorce Certificate: \_\_\_\_\_
- ☐ Property Deeds \_\_\_\_\_
- ☐ Car Titles: \_\_\_\_\_

### #2 Financial Accounts

- ☐ Bank Account: \_\_\_\_\_
- ☐ Account type/mumt: \_\_\_\_\_
- Notes: \_\_\_\_\_

### Insurance Policies

- ☐ Life Insurance: \_\_\_\_\_
- ☐ Policy Number: \_\_\_\_\_
- ☐ Agent/Contact: \_\_\_\_\_

### Beneficiaries & Contacts

- ☐ Name: \_\_\_\_\_ Relationship .. Contact info: \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Notes & Instructions

\_\_\_\_\_  
\_\_\_\_\_



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# After the Loss of a Loved One:

## — The Next Steps —



Once you've addressed immediate tasks, consider these additional steps as you adjust to life after the loss of your loved one.

- ☐ Review and organize the loved one's personal belongings.
- ☐ Finalize the probate process and settle the estate.
- ☐ Update legal documents: will, power of attorney, medical directives.
- ☐ Review and manage recurring bills and subscriptions.
- ☐ Address and pay final debts: medical bills, loans, credit card balances.
- ☐ Notify professional advisors: lawyer, accountant, financial planner.
- ☐ Update your own legal and financial documents.
- ☐ Keep track of important dates: anniversaries, birthdays.
- ☐ Remember your loved one through photos, a memorial, or a charity donation.
- ☐ Stay connected with family and friends for support.
- ☐ Explore support groups or counseling if needed.
- ☐ Take the time you need to heal and move forward at your own pace.

Be kind and patient with yourself as you navigate this journey.



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