

Aftercare Checklist

A helpful list of things that must be done after the loss of a loved one.

To be done immediately:

- ☐ Contact Social Security.
- ☐ Contact your loved one's place of employment.
- ☐ Contact the Veterans Administration, if applicable.

Within 1-2 weeks:

- ☐ Obtain certified copies of your loved one's death certificate (you will need those to complete many of the steps below).
- ☐ File all life insurance claims.
- ☐ Notify the post office to forward mail, if applicable.
- ☐ Notify insurance companies (auto, home owner's, pensions, health, Medicare, etc.).
- ☐ Notify banks, credit card companies and loan organizations.
- ☐ Meet with a probate attorney.

Within 1-2 months:

- ☐ Select a grave marker and finalize engraving*.
- ☐ Send thank you notes.
- ☐ Notify your loved one's doctor's office.
- ☐ Pay any outstanding bills (utilities, internet, cable, rent, etc.).
- ☐ Discontinue utilities if needed (including cable, internet and phone).
- ☐ Contact your loved one's cell phone provider and discontinue service.
- ☐ Notify your loved one's financial advisor.

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- ☐ Notify credit reporting and security agencies (Equifax, Experian, TransUnion and LifeLock) to minimize the chance of identity theft.
- ☐ Close email and website accounts.
- ☐ Close or change social media accounts. Some sites will allow you to change the page to a memorial page and set up someone as the page administrator.
- ☐ Transfer property titles (house, car, etc.).
- ☐ Cancel your loved one's driver's license.
- ☐ Cancel any outstanding memberships (gyms, professional organizations, fraternities/sororities, etc.).
- ☐ Cancel any subscriptions (magazines, newspapers, streaming services, etc.).
- ☐ Identify any insurance policies with your loved one listed as the primary beneficiary, and contact the insurance carrier to make appropriate adjustments.

Within the first year:

- ☐ File your loved one's final tax return.
- ☐ Notify the election board in your loved one's primary state of residence.
- ☐ Contact the funeral home if interested in making funeral arrangements for yourself or a loved one.*

*Some of these things can be done in advance. Please contact our funeral home if you are interested in making your own prearrangements.

