Post-Funeral To-Do Checklist

This list is provided to help you keep track of the many tasks that you may need to complete (if applicable) following your loss. Explanations for these items may be available upon request.

Filing for Benefits
• Social Security Administration
• Department of Veterans Affairs
• Retirement or Pension Funds
• Union Benefits
• Professional or Fraternal Organizations
• Life Insurance
• Wills and Estates

Additional Paperwork (notification of death and name changes)
• Banking:
• Checking Account/Savings Account
• Safe Deposit Boxes
• Charge/credit cards
• Mortgages (savings and loan/titles and deeds to property)
• Estate, Inheritance and Other Taxes (federal and state taxes: estate and inheritance)
• Mutual Funds and/or Stocks and Bonds
• Trusts and Trust Funds
• Automobile Title and Licensing
• Utilities, Telephone and Other Household Accounts
• Insurance (change of beneficiary/update policies): Health, Auto, Homeowners, Personal Property

Advanced Funeral/Cremation Planning for the Survivor

• Pre-Planning your wishes
• Pre-Funding your wishes with a funeral insurance policy
• Place copies of your policy in safe locations and inform children if necessary
• Order headstone if needed