



A guided checklist

What to do after a loved one passes away

It's understandable and valid to feel overwhelmed after a loved one passes away. This is a simple checklist to help remind you of the important things to get done. You can download and print this checklist out to keep track of your progress.

Please be advised, this checklist is not meant to be exhaustive. It is simply a guide and not an official "one-size-fits-all" list of steps to follow. Each person's and every family's circumstances are different and may require different tasks and considerations.



Scan here for more
resources about
bereavement and grief.

A checklist

Immediately after a loved one passes away

COMPLETE

Get a legal pronouncement of death by a physician, facility nurse or hospice nurse.	<input type="radio"/>
Speak with the nurse or hospital about transportation arrangements for your loved one.	<input type="radio"/>
Determine if funeral arrangements were made. Your loved one's will may contain certain wants or wishes.	<input type="radio"/>
Inform your employer and request bereavement time off.	<input type="radio"/>
Schedule a family meeting to talk through funeral arrangements or get them started. Delegate specific tasks to family and friends.	<input type="radio"/>
Inform family, friends and important contacts such as clients, neighbors, educational institutions, health care providers or employers, if applicable.	<input type="radio"/>
Determine care for your loved one's pets.	<input type="radio"/>

Within a few days after a loved one passes away

COMPLETE

Make sure their property is safe and secure and someone trustworthy has the keys to both their property and any vehicles.	<input type="radio"/>
Meet with a funeral home or cremation services representative.	<input type="radio"/>
Solidify funeral arrangements.	<input type="radio"/>
Post funeral details and the obituary online if you'd like it to be public.	<input type="radio"/>
Notify professional financial services of their death: <input type="radio"/> Insurance companies: <input type="radio"/> Life <input type="radio"/> Car <input type="radio"/> Medical <input type="radio"/> Travel <input type="radio"/> Banks and financial institutions, including credit agencies	<input type="radio"/>

Within a couple weeks after a loved one passes away

COMPLETE

Get 20 copies of the death certificate from the vital records office of the state they passed away in.

Find your loved one's will and determine the executor (the person who will administer the provisions of the will).

- If there is no will, probate court may be needed to settle your loved one's estate. Contact your local probate registry or hire a probate attorney to help guide you.

Put in a forwarding order for mail at your local post office, if necessary.

Make an inventory of all your loved one's assets and track down their location.

Gather your loved one's important documents and place them together in a safe place:

- | | |
|--------------------------------------------|----------------------------------------------------------------------------------------|
| <input type="radio"/> Driver's license | <input type="radio"/> Tax documents |
| <input type="radio"/> Social Security card | <input type="radio"/> Passport |
| <input type="radio"/> Birth certificate | <input type="radio"/> Cell phone (save important photos before storing the phone away) |
| <input type="radio"/> Titles or deeds | |

Make a list of all bills your loved one was paying and change payment* if necessary:

- | | |
|-----------------------------------------------|------------------------------------------|
| <input type="radio"/> Mortgage or rent | <input type="radio"/> Water |
| <input type="radio"/> Tax payments | <input type="radio"/> Gas |
| <input type="radio"/> Auto loan and insurance | <input type="radio"/> Lawn/pool services |
| <input type="radio"/> Electricity | |

**Write down usernames and passwords to important websites, if changing information*

Cancel services no longer needed:

- Streaming services
- Internet
- Phone
- Cable
- Repeat deliveries or subscriptions
- Memberships (wholesale clubs, gyms, etc.)

