

## What to Do If a Death Occurs: Checklist

- Obtain Death Certificate
- Notify Necessary Parties
  - Relatives
  - Friends
  - Funeral Director
  - Cemetery
  - Priest, Rabbi, Minister, or Other
  - Employers
  - Unions or Fraternal Organizations
  - Newspapers
  - Social Security Office
  - Bank/Financial Institution
  - Insurance Companies
- Locate Important Documents
  - Will and/or Trust
  - Insurance Policies
  - Deed and Mortgage for Home
  - Title for Automobiles
  - Safety Deposit Box
  - Completed Planning Book (if applicable)
- Determine Funeral Arrangements
  - Time and Place of Service
  - Type of Service
  - Burial Arrangements
  - Casket, Vault, Cremation Niche, or Other

- Memorial/Headstone
- Clothing
- Flowers
- Music
- Food
  
- Settle the Estate
- Forward Mail
- Determine Employer or Veteran Death Benefits
- Pay Outstanding Bills
- Close Bank Accounts and Credit Cards
- Determine Care for Children and/or Pets
- Lock Home(s) and Car(s)