



# CHEEKLIST

## When a loved one dies

... family members aren't always thinking about the business at hand. This is a very emotional time and the task of organizing the deceased member's funeral and financial matters can seem enormous. *Below is a checklist to help ease the burden on the family.*

### IMMEDIATE ACTION:

- Call relatives and friends
- Full name of deceased
- Funeral arrangements
- Have prior arrangements been made?

### TYPE OF SERVICE PREFERRED:

- Funeral
- Non-religious
- Open casket
- Family only
- Memorial service
- Religious
- Closed casket

### ARRANGEMENTS:

- Location and time of service
- Scripture readings
- Reception or lunch/dinner after the service
- Music preferred for service (organist, soloist or hymns)
- Visiting hours
- Eulogies/personal statements
- Reception or lunch/dinner provided by
- Music selections

### PARTICIPANTS:

- Person officiating
- Speakers
- Pallbearers/honorary pallbearers
- Musicians
- Ushers

### COLLECT COPIES OF THE FOLLOWING:

- Certified copies of the death certificate (you'll need six and they will be provided by the funeral director)
- Location and account numbers from bank accounts
- Insurance policies
- Birth certificate
- Military records
- Last three years of tax returns
- Call the attorney who is handling the will so that they can notify witnesses and schedule a meeting to handle estate settlement.
- Contact banks to verify status of checking, savings and safety deposit box.
- Have executor adjust ownership of any insurance policies on the lives of others
- Last will
- Financial statement
- Marriage license
- Social Security number
- List of employer fringe benefits
- Advise executor of estate, if known.
- Contact broker to arrange re-titling of securities.
- Notify insurance broker to modify casualty and homeowners insurance as necessary.
- Stop or forward the deceased mail and newspaper subscriptions.
- Have executor re-title real estate that was owned by the deceased.
- Secure home, if empty



## SUPPORT GROUPS

Call (877)699-7794 for more information.

Grief education and bereavement support groups are available in the Scottsbluff and Alliance area.

Educational classes and support groups are held monthly.