Checklist of Tasks to be Completed

Pre and Post Death

As far in advance as possible…

- ❑ Review legal documents (consult with Elder Law attorney, if necessary)
  - Trust
  - Will
  - Durable Powers of Attorney (Financial and Health)
- ❑ Review medical documents
  - Advanced Health Care Directives
  - DNR and/or POLST
- ❑ Select a funeral home or cremation service and make as many arrangements as possible (including final disposition of remains).
- ❑ If a military veteran, contact Veteran's Administration to see whether eligible for benefits.
  - Financial assistance
  - Free burial at national cemetery
- ❑ Make a decision regarding brain donation/autopsy and complete necessary paperwork.
  - Notify funeral home, hospice service, and primary care physician of donation/autopsy requirements.

When death is eminent…

- ❑ Review brain donation/autopsy paperwork and notify program coordinator of eminent death, per specific instructions.
- ❑ Contact clergy who you may wish to perform any final rites.

Upon death…

- ❑ If under hospice care, notify hospice service – they will come and declare time of death, verify death certificate information, consult on disposal of medications, and make arrangements for any rented medical equipment to be picked up.
- ❑ If in-hospital, they will declare time of death and verify death certificate information, and assist in funeral home notification.

- ❑ Notify brain donation/autopsy program
- ❑ Notify funeral home/cremation services
- ❑ Notify immediate family

Within a few days after death…

- ❑ Make final funeral arrangements and determine how many copies of death certificate you require (funeral home will order).
- ❑ Notify Social Security Administration of death (confirm with funeral home that they make this notification).
- ❑ Stop all auto-ship orders (i.e. incontinence supplies).

Within 30 days after death…

- ❑ Pick up copies of death certificate from funeral home
- ❑ Contact your estate attorney
- ❑ Contact your tax accountant
- ❑ Contact your financial advisor
- ❑ Contact your insurance agent/provider
- ❑ If eligible, apply for survivor's benefits:
    - o Social Security Administration
    - o Veteran's Administration
    - o Pension/employer plans
- ❑ Start gathering the following and begin making necessary notifications/claims/changes:
    - o Life insurance policies
    - o Annuities
    - o DMV documents
        - ▪ Driver's license (to be returned to DMV)
        - ▪ Handicapped parking placard (to be returned to DMV)
        - ▪ Vehicle title papers (loved one's name to be removed)

- Legal documents (in addition to death certificate)
    - Wills
    - Trusts
    - Deeds of trust (property owned)
    - Birth certificate
    - Marriage license
    - Military discharge papers (DD-214)
- Financial documents
    - Bank account and brokerage statements
    - Stock certificates
    - Credit card information
    - Pension/employer benefits information

- [ ] After filing all medical claims, cancel any medical and/or supplemental insurance policies (Medicare will be notified by SSA).

Additional considerations…

- [ ] Check your loved one's credit report to verify all credit accounts.
- [ ] Notify all 3 credit reporting services of the death (TransUnion, Equifax, Experian).
- [ ] DO NOT CLOSE ANY BANK ACCOUNTS OR CREDIT CARD ACCOUNTS – until all direct deposits, ACH debits, and bill payments have been redirected.
- [ ] Notify the County Registrar of Voters to remove your loved one from the voter rolls.
- [ ] Contact e-mail account providers to report death of user (each have different criteria for reporting and closing accounts).
- [ ] Close other on-line accounts
    - Social media, i.e. Facebook, Instagram, Snapchat
    - Shopping accounts

Pre and Post Death

Other items…

1) ____

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2) ____

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3) ____

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4) ____

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Additional notes…