

After-Death Checklist for Survivors

Many people find that having a checklist of decisions to be made and tasks to be done when a death occurs helps them to be better organized and, thus, reduces some of the anxiety associated with an emotional time. We hope you find this checklist helpful.

- Decide who will do what tasks
- Contact those who will take on responsibilities
- Have someone write down every decision made and every action taken

Deceased's basic personal information

- Full legal name
- Legal residence
- Length of time at current address
- Date of birth
- Place of birth
- Citizenship
- Health insurance information
- Social Security Number
- Occupation
- Employment or business history
- Marital history
- Spouse's full name
- Father's name
- Father's birthplace
- Mother's name
- Mother's birthplace
- Next of kin, addresses, and relationship
- Executor's name and contact information
- Attorney's name and contact information
- Doctor's name and contact information

Deceased's obituary information *

- High school attended
- University attended
- Military record
- Family history
- Work or professional history
- Religious activities and affiliations
- Civic activities

- Special awards and accomplishments
- Hobbies, activities and interests
- Charities and other special requests

Contacts before disposition

- Relatives and friends
- Religious groups
- Organizations of which deceased was a member:
 - Professional groups
 - Unions
 - Civic groups
 - Political groups
- Professionals that were close to deceased
- Places of prior employment

Disposition choices

- If deceased was a veteran, determine eligibility for Veterans burial benefits
 - Determine if deceased had a prepaid funeral contract
 - Who will make disposition arrangements?
 - Choose burial or cremation or body donation
 - Choose type of service (funeral with or without a visitation), memorial service, graveside service)
 - Decide on funeral home or those who will act as funeral director
 - Set time and date of service
-

Disposition choices (continued)

- Choose location of service
 - Discuss need for preparation/refrigeration/embalming
 - Decide on viewing (none, family only, public)
 - Decide on visitation with family
 - Discuss casket or cremation container
 - Discuss grave liner/burial vault or cremation urn, if desired
 - Choose a cemetery or place of burial, if needed
 - Arrange for burial plot or columbarium niche (unless ashes are to be scattered)
 - Purchase grave marker (this can wait until later)
 - Discuss other funeral needs, such as:
 - Guest register
 - Funeral or memorial service programs
 - Acknowledgement cards
 - Floral arrangement (if desired for casket)
 - Determine whether any personal items are to be buried or cremated with deceased
 - Supply clothing for deceased
 - Select photographs and memorabilia to be displayed
 - Make musical selections for any services
 - Determine content of any services (readings, scripture, comments, etc.)
 - Prepare and submit obituary to newspaper(s) and/or to AMBIS for website if deceased was an AMBIS member
 - Determine whether donations are to be suggested
 - Locate religious or associational items to be used in services, if any
- Make arrangements for reception, if any
 - Determine need for:
 - Hearse
 - Clergy car
 - Family limousine
 - Pallbearer limousine
 - Flower car

Documents that may be needed

- Title to burial plot
- Prepaid funeral contract, if any
- Will
- Birth certificate
- Marriage certificate
- Insurance policies
- Bank records
- Deeds to property
- Vehicle ownership records
- Military discharge papers
- Citizenship papers
- Tax returns

Contacts after disposition

- Doctors (primary care and specialists)
- Dentist
- Employer
- Accountant
- Lawyer
- Banks and credit unions
- Insurance agent
- Financial/investor advisors and agents
- Creditors
- Those who owed money to the deceased
- Pension plan administrator
- Social Security Office
- FCA of Central Texas if deceased was a member
- Department of Veterans Affairs, if deceased was a veteran