WHAT TO DO WHEN A LOVED ONE PASSES

Timeline & Checklist

Funeral Home Support:

Most Funeral Homes offer additional services such as:

- Preparing & filing for the death certificate
- Requesting Social Security survivor benefits
- Filing for life insurance benefits
- Applying for Veteran's burial benefits
- Referrals for grief support, therapists, or books

Be sure to ask for a full list of what services the funeral home will complete or assist with.

Retirement™ Planning Center

Need help planning for the future?

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	Initial Days
☐	Notify Close Friends and Family
☐	Contact Funeral Home
☐	Obtain Medical Certificate of Cause of Death (MCCD)
	Week One
☐	Order Death Certificates
☐	Contact a Trusted Advisor or Friend to help during this difficult time
	Week Two
☐	Contact Government Agencies - Social Security, Medicare, Department of Transportation
☐	Notify your Bank/Credit Union
☐	Notify Doctors/Pharmacy
☐	Notify Employer/Retiree Groups - Pension, Life Insurance, Other Compensation, Health Insurance (obtain COBRA details for dependents)
	Week Three
☐	Notify Credit Card Companies (get a current statement to check for recurring payments)
☐	Contact Insurance Agents & Companies (health, home, car, life, etc.)
☐	Contact Accountant, Financial Advisor, Attorney, etc.
☐	Notify Credit Agencies and Request Credit Reports (Equifax, Experian, TransUnion)
	Week Four
☐	Cancel Memberships & Subscriptions (Costco, Online Subscriptions, Magazines, etc.)
☐	Close Email, Virtual, and Social Media Accounts
	Financial Preparation/Documents
☐	List of Assets (CPA will require snapshot from date of death)
☐	List of all Debts
☐	Copies of Insurance Policies
☐	Copy of Will & Trust