

## Things to Do Following the Funeral

- \_\_\_ 1. Obtain certified copies of the death certificate.
  
- \_\_\_ 2. Write and send acknowledgment cards. Within 7 to 10 days after the funeral you should acknowledge those who extended special help, or sent flowers, or made contributions to designated charities. While you may also wish to acknowledge letters of sympathy, it is not necessary to answer notes or cards.
  
- \_\_\_ 3. Be prepared to receive a number of letters and phone calls for the deceased, which may continue for some time after death. Do not let these upset you, remembering that these people are making an unintentional mistake.
  
- \_\_\_ 4. Meet with attorney to commence probate proceeding. Provide the attorney with a copy of the will and certified copy of death certificate. If a properly prepared will exists, the executor named is authorized to make the necessary distributions. This can only be done after the will has been submitted for probate, and letters testamentary are received from your court. If there is no will, an appointed administrator will distribute all property according to your local laws. If there should be any questions regarding estates, please consult your attorney.
  
- \_\_\_ 5. Notify insurance companies and file claims when applicable. Your insurance representative will be able to answer any questions you may have.
  - Life Insurance-Your Funeral Director can assist you with this
  - Medical, Health, Disability, Travel and Accident Insurance
  - Pension Benefits
  - Homeowners Insurance
  - Notify employer of deceased
  
- \_\_\_ 6. Transfer vehicle title
  
- \_\_\_ 7. Change auto insurance
  
- \_\_\_ 8. Return Driver's License
  
- \_\_\_ 9. Apply for appropriate benefits when applicable
  - Social Security Benefits-Your Funeral Director will notify Social Security of the death
  - Veteran's Burial and Survivor Benefits-Your Funeral Director will apply for these benefits
  - Worker's Compensation Benefits
  
- \_\_\_ 10. Notify Stockbrokers
  - Change ownership of jointly- or solely-owned stocks
  - Cancel any open orders arranged by the deceased
  
- \_\_\_ 11. Notify Bank

- Change all jointly held accounts and correct tax ID numbers (usually Social Security numbers)
- Cancel direct deposit of retirement benefit payments
- Re-establish title of safe deposit box
- Re-establish outstanding mortgages, personal notes, etc.
- Apply for all credit life insurance which may exist

\_\_\_ 12. A monument or marker should be installed at the cemetery as soon as time permits. Many different styles are available, and it is wise to take your time in making your selection. It is a good decision to check with the cemetery official to find out if there are any restrictions as to size or material of the monument. Your funeral director or monument salesperson will be glad to answer your questions in this regard.