

## What to do When a Loved One Dies:

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### Right Away – Before Meeting with Funeral Director

1. Contact the funeral home to take your loved one into their care. During this phone call, you will also set up a time to meet with the Funeral Director. Before attending the meeting, you may want to have all of the information from step 7 and all of the documents from step 8 gathered in order to prevent frequent trips to the funeral home.
2. Contact your minister. Phone Number: \_\_\_\_\_
3. Alert immediate family members and close friends.
4. Arrange for the care of any dependents.
5. If the deceased had any pets, arrange for their immediate care.
6. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
7. Compile the following information that the funeral home will need in order to finalize the death certificate:

<input type="checkbox"/> First, middle, and last name	<input type="checkbox"/> Father's Name
<input type="checkbox"/> Maiden Name (if applicable)	<input type="checkbox"/> Mother's Maiden Name
<input type="checkbox"/> Address of Residence	<input type="checkbox"/> If they were a Veteran (all of the below Information can be found on DD-214 Discharge Papers):
<input type="checkbox"/> Social Security Number	<input type="checkbox"/> Entered Service Date
<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Entered Service Place
<input type="checkbox"/> Gender	<input type="checkbox"/> Service Number
<input type="checkbox"/> Race/Ethnicity	<input type="checkbox"/> Separated from Service Date
<input type="checkbox"/> Marital Status	<input type="checkbox"/> Separated from Service Place
<input type="checkbox"/> Spouse's full name, and maiden name (if applicable)	<input type="checkbox"/> Grade, Rank, or Rating
<input type="checkbox"/> Highest level of education attained	<input type="checkbox"/> Organization and Branch of Service
<input type="checkbox"/> Occupation	<input type="checkbox"/> Clubs and Organizations
<input type="checkbox"/> Place of Birth (City and State)	

You can make notes on the following page.

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## Next Day

8. Locate loved one's important documents (items in bold are necessary for the meeting with the Funeral Director):
  - ☐ Will
  - ☐ Birth Certificate
  - ☐ **Social Security Number/Card**
  - ☐ Marriage License
  - ☐ **Military Discharge Papers (DD-214)**
  - ☐ **Deed to burial property**
  - ☐ **Copy of funeral prearrangements**
  - ☐ **Life insurance policies**
9. In the case of burial, bring clothing (including undergarments) to your meeting with the Funeral Director.
10. In the case of burial, give some thought to who will serve as casket bearers.
11. Decide in which newspapers you would like to publish the obituary. The funeral home will handle these arrangements, you only need to choose which papers.
12. Give some thought to the music, which will be played during funeral/memorial services. You can decide on specific songs or decide only on the genre of music you would like (hymns, country, gospel, etc.)
13. Decide on one or two charitable organizations to designate for memorial contributions. Some examples would include: American Heart Association, the Eureka Public Library, or your loved one's church.
14. Bring a nice photo for public display to your meeting with the Funeral Director. If you're interested in a tribute video, bring up to 75 photos to display in the video as well.
15. Write a short biography if you feel you're able to; otherwise, the Funeral Director will be happy to do so at your conference with them.
16. If applicable, notify agent under Power of Attorney.
17. Alert the executor of your loved one's Will.
18. Notify your attorney regarding the probate of the estate.
19. Arrange for the disposal of any perishables left in the deceased's home – such as food, refrigerated items, and existing refuse.



## Within One Month of the Death

1. Consult with an attorney about probate.
2. Meet with an accountant to discuss estate taxes.
3. File claims with life insurance companies.
4. Contact the Social Security Administration and other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits. Independence SSA Office: (877) 512-3855
5. Notify the Registrar of Voters. (Greenwood County Clerk's Office, 583-8121)
6. If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, etc. (Eureka Herald, 583-5721; Mediacom, 855-633-4226)
7. Cancel and dispose of deceased's prescriptions. Inquire at your pharmacy for the best method of disposition (Eureka Pharmacy, 583-5488). Do not flush medications.
8. Contact the Department of Motor Vehicles to cancel deceased's driver's license and transfer titles of all registered vehicles (GW Co. Treasurer's Office, 583-8146).
9. If your loved one was a veteran, inquire about the benefits you may be entitled to through the Department of Veterans' Affairs (Kansas Commission on Veterans' Affairs, Emporia Office: (620) 342-3347)
10. Contact the deceased's employer. Inquire about any 401(k), pension, or company benefits that the decedent may be entitled to.
11. Notify all 3 credit reporting agencies.
12. If the death was accidental, verify whether benefits are available on existing insurance policies.
13. Check for any life insurance benefits available through existing credit card or loan accounts.
14. File any outstanding claims for health insurance or Medicare benefits.
15. Obtain copies of deceased's outstanding bills.

16. Locate and/or obtain other important paperwork of the deceased that will be necessary for the settlement of their estate:
  - ☐ Copies of the certified Death Certificates
  - ☐ Real estate deeds and titles
  - ☐ Stock certificates
  - ☐ Loan paperwork
  - ☐ Bank and retirement account statements
17. Advise all creditors in writing that a death has occurred.
18. Change ownership of assets and lines of credit.
19. Update *your* Will.
20. Update beneficiaries on your life insurance policies, if necessary.
21. Send acknowledgement cards for flowers, donations, food, or any significant gestures of kindness. Also, remember to thank casket bearers.
22. Organize and distribute decedent's personal belongings.

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