

## POST FUNERAL CHECKLIST

*The following is a list of those items which should be attended to following the funeral of your loved one.*

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- Certified Copies of the Death Certificate**  
*At the arrangement conference, Snodgrass Funeral Home will help you to determine the number of Death Certificates you need. Additional copies can be obtained by contacting the Funeral Home.*
  
- Mail Thank You Cards**
  
- Change all Utilities from the Deceased's Name**  
*It is a good idea to use only your first initial and last name when listing your name in the phone book. This will help avert any unwanted or prank calls. Many, if not all, of these accounts should be placed in a joint account with another family member to help in processing future estates.*
  
- Contact all Health Insurance Companies**  
*You should notify the Health Insurance Company to stop coverage of the deceased as of the date of death.*
  
- Contact Life Insurance Company**  
*The insurance company will require a Certified Copy of the Death Certificate, the Insurance Policy, and a claim form to be completed and signed by the beneficiary. The claim form will be provided by the insurance company after they are notified of the death. Should you need assistance completing the form, please feel free to call the Funeral Home for assistance. You will also want to change those policies which the deceased was named beneficiary. Generally the owner of the policy must contact the insurance company to request a change of beneficiary form. This form is then completed and returned to the company. They will then return a rider which is attached to the policy showing the changes made. If you have an insurance agent locally, it is best to contact them for assistance.*
  
- Notify Banking Institutions**  
*It is recommended that each banking institution, that the deceased had account in, be notified of the death. A Certified Copy of the Death Certificate may be needed by each bank. On any outstanding loans, you will want to check to see if there was life insurance carried on them. If so, your banker will advise and assist you with the details. You will want to remove the deceased's name from all joint accounts (checking, savings, safety deposit box and any other that your banker recommends) and sign a new signature card for these accounts. This is for your protection, should someone try to gain access to these accounts they could not sign the deceased's name to them to remove any funds. It is also recommended that if these accounts were held jointly, you may want to continue them to be joint accounts by placing the name of a family member or trusted friend on them with you. Again, this is for your protection. Should you become unable to access these accounts the other individual named could for you.*

## **POST FUNERAL CHECKLIST (cont.)**

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- Contact Automobile Insurance Companies**  
*You should notify the Automobile Insurance Agent of the change of coverage to any and all automobile policies under the deceased's name. Your agent will advise you of the proper change needed depending on the ownership changes to the automobiles.*
- Notify all Credit Card Companies**  
*Cancel and Close all accounts and all cards held individually by the deceased. Cut these cards and either return them to the company or discard them. Remove the deceased's name from all jointly held cards. This is for your protection. Apply for credit card life insurance coverage held on the accounts of the deceased.*
- Contact Attorney**  
*Documents needed by the Attorney include the certified copies of the death certificates and the Will. Your attorney will advise you as to any other documentation needed.*
- Notify Accountant / Financial Advisor / Tax Preparer**  
*The above named individual will advise you of any documentation needed. Refer to the "Final Tax Return" section.*
- Notify Stockbroker**  
*Your stockbroker will advise you of how many Certified Death Certificates you will need as well as any further documentation needed.*
- Notify Fraternal Organizations of which Deceased was a Member**  
*A Certified Copy of the Death Certificate may be needed to apply for any benefits.*
- Review Your Own Insurance Needs**  
*Often, these needs change after the death of a family member or other loved one. Good organization of your own insurance information can aid survivors at the time this information is needed.*
- Keep Extra Copies of Death Certificates to Send With Your Income Tax Returns**  
*You may need to file a "final return" for the deceased or estate income tax returns if the estate itself generates any income.*
- Call the Social Security Administration**  
*Social Security benefits include a one time benefit of \$255.00 to the surviving spouse or dependent children. Check with your funeral director to determine what claims have already been filed for you.*
- Veteran's Administration**  
*Claim forms can be completed at a Veteran's Administration Office, the funeral home or Veterans Service Commission. Contact your funeral director to see if this claim has already been filed for you.*