

# Aftercare Checklist

A helpful list of things that must be done after the loss of a loved one.

## To be done immediately:

- Contact Social Security.
- Contact your loved one's place of employment.
- Contact the Veterans Administration, if applicable.

## Within 1-2 weeks:

- Obtain certified copies of your loved one's death certificate (you will need those to complete many of the steps below).
- File all life insurance claims.
- Notify the post office to forward mail, if applicable.
- Notify insurance companies (auto, home owner's, pensions, health, Medicare, etc.).
- Notify banks, credit card companies and loan organizations.
- Meet with a probate attorney.

## Within 1-2 months:

- Select a grave marker and finalize engraving\*.
- Send thank you notes.
- Notify your loved one's doctor's office.
- Pay any outstanding bills (utilities, internet, cable, rent, etc.).
- Discontinue utilities if needed (including cable, internet and phone).
- Contact your loved one's cell phone provider and discontinue service.
- Notify your loved one's financial advisor.

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- Notify credit reporting and security agencies (Equifax, Experian, TransUnion and LifeLock) to minimize the chance of identity theft.
- Close email and website accounts.
- Close or change social media accounts. Some sites will allow you to change the page to a memorial page and set up someone as the page administrator.
- Transfer property titles (house, car, etc.).
- Cancel your loved one's driver's license.
- Cancel any outstanding memberships (gyms, professional organizations, fraternities/sororities, etc.).
- Cancel any subscriptions (magazines, newspapers, streaming services, etc.).
- Identify any insurance policies with your loved one listed as the primary beneficiary, and contact the insurance carrier to make appropriate adjustments.

## Within the first year:

- File your loved one's final tax return.
- Notify the election board in your loved one's primary state of residence.
- Contact the funeral home if interested in making funeral arrangements for yourself or a loved one.\*

\*Some of these things can be done in advance. Please contact our funeral home if you are interested in making your own prearrangements.