

125 Tasks to Consider

on One of Life's Most Difficult Days

Losing a loved one is an incredibly challenging experience. In addition to the emotional toll, families are often faced with a long list of decisions and responsibilities like the ones noted here. By planning ahead, you can help ease this burden, giving your loved ones the time and space to focus on remembrance and support.

Secure vital statistics

1. Full legal name
2. Complete address
3. Telephone number
4. Email address
5. Date of birth
6. Place of birth
7. Marital status
8. Name of spouse
9. Spouse's maiden name
10. Education and/or degrees obtained
11. Citizenship
12. Father's name
13. Father's birthplace
14. Mother's name (including maiden name)
15. Mother's birthplace
16. Names of children, grandchildren and great-grandchildren
17. Social Security number
18. Veteran's serial/service number
19. Date and place of military service
20. Date of discharge from military service
21. Length of stay at current residence/
former residences
22. Employment history
23. Location of most recent employer, including
contact information
24. Family origin

Decide, plan and arrange within a few hours

25. Cemetery arrangements
26. Interment space and exact location of
burial/disposition
27. Opening and closing of the grave/
mausoleum/niche space
28. Endowment care
29. Graveside committal service
30. Use of cemetery chapel for committal prayers
31. Embalming and other preparation for loved one
32. Restorative art
33. Funeral home selection
34. Location of funeral service
35. Service type (religious, fraternal, military, etc.)
36. Time and place for visitation and funeral service
37. Alternative services (non-religious, celebrant,
celebration of life event)
38. Eulogy content (and who will deliver it)
39. Casket selection (open or closed)
40. Outer burial container and/or burial vault
41. Urn/niche space
42. Obituary content and placement
43. Clothing for loved one
44. Jewelry and glasses for loved one
45. Cosmetology and hairdressing for loved one
46. Scripture, readings and/or poem choices

Decide, plan and arrange within a few hours continued...

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| 47. Clergy, celebrant or other officiant | 63. Extra chairs; special seating requirements (i.e. accessible for people with disabilities) |
| 48. Grave marking (temporary or permanent) | 64. Reviewing and signing paperwork (i.e. burial permit) |
| 49. Memorial marker/monument setting and inscription | 65. Main point(s) of contact for answering phone calls, emails, letters, etc. |
| 50. Charitable organization preferences for memorials in memory of loved one | 66. Meetings with funeral director, lawyer, clergy and cemetery representative |
| 51. Register book, memorial/prayer cards | 67. Transportation and lodging for out-of-town guests |
| 52. Pallbearer choices | 68. Acknowledgements for those who help in a special way (contributors of flowers, food, other donations) |
| 53. Floral arrangements and their delivery | 69. Number of certified copies of death certificate to order |
| 54. Music selections | 70. Food for family and out-of-town relatives and guests |
| 55. Music performer(s) such as organist, pianist and/or vocalist | 71. Items for memento display and/or memorial board |
| 56. Funeral coach arrangements | 72. Memorial video production needs, including photos, music, etc. |
| 57. Limousine for family and pallbearers | 73. Thank you notes |
| 58. Funeral car list for family and select guests | |
| 59. Transportation for other family members and guests | |
| 60. Funeral clothing for family members | |
| 61. Care of children and pets during services | |
| 62. House cleaning | |

Notify as soon as possible

- 74. All immediate family members
- 75. All other relatives
- 76. All friends
- 77. Minister and church
- 78. Funeral director
- 79. Pallbearers
- 80. Cemetery caretaker
- 81. Doctor(s)
- 82. Employer of deceased
- 83. Employers of family members who will miss work
- 84. Music performer(s) such as organist, pianist and/or vocalist
- 85. Newspapers (for notices and/or obituary arrangements)
- 86. Social Security Administration
- 87. Veterans Administration
- 88. Insurance agents
- 89. Community organization leaders
- 90. Attorney, accountant, financial planner and executor of estate
- 91. Banks and credit card companies
- 92. Cell phone and online account providers (email, social media, etc.)

Pay for some or all of the following

- 93. Estate/inheritance taxes
- 94. Funeral service expenses
- 95. Family burial estate, mausoleum or cremation niche
- 96. Permanent memorialization
- 97. Monument/marker engraving
- 98. Funeral director fees
- 99. Clergy fees
- 100. Music performance expenses
- 101. Floral arrangements
- 102. Obituary costs
- 103. Any special event services or requests
- 104. Funeral catering/ other food expenses
- 105. Transportation
- 106. Medical personnel fees
- 107. Ambulance transportation
- 108. Hospital, nursing home and/ or hospice costs
- 109. Medications
- 110. Immediate bills (mortgage/ rent, taxes, loans, credit cards, utilities, etc.)

Collect documents and paperwork

- 111. Will
- 112. Birth certificate/ legal proof of age
- 113. Certificates, permits and other legal papers
- 114. Citizenship papers
- 115. Social Security card
- 116. Marriage license
- 117. Veteran's discharge certificate
- 118. Insurance policies (life, health, accident, property, auto) and government forms
- 119. Disability claims
- 120. Bank books and listing of accounts
- 121. Other financial documents
- 122. Property deeds
- 123. Cemetery deed or proof of ownership
- 124. Auto titles or bill of sale
- 125. Income tax returns, receipts and cancelled checks

