

“What’s next”...



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***An informational guide and
post-funeral checklist prepared for you by
the Glunt Funeral Home and Crematory, Inc.***

From the Glunt family to yours...



...we thank you for the trust you have placed with us to take care of final arrangements for your loved one. We understand how difficult this time may be for you.

When a loved one dies, you are required to notify a number of agencies and institutions of their death. The directors and staff of the Glunt Funeral Home and Crematory, Inc. have put together the following checklist to help guide you through this process. For many government and financial entities, you will need the decedent's social security number, certified death certificate and, if you are the executor or personal representative of the estate, your appointment form from probate court (commonly called the "Short Certificate").

This checklist may contain steps you do not need, and it may not include some that are unique to your situation. Keep in mind these are general guidelines, and that timelines, contacts and actions may vary, based on your individual needs. As you navigate through the following pages, please feel free to consult our staff with any questions or concerns you may have.

CHECKLIST ONE

Within the first two weeks:

- ☐ *Locate and read the decedent's Last Will and Testament or letter of instruction.*
- ☐ *Locate life insurance policies, annuities, pension records, or any documents that include a death benefit provision. Notify parties of the death and request claim forms. (Our staff may be able to help you with filing those claims.)*
- ☐ *Notify any other insurance the decedent may be covered by, including mortgage, automobile, medical, accident, dental, disability, etc.*
- ☐ *Locate other important documents, such as titles and deeds.*
- ☐ *Close credit card accounts where the decedent was the only signer.*
- ☐ *Notify lending institutions, if the decedent had any personal or auto loans.*
- ☐ *Cancel any autopay drafts that may be posting to the decedent's bank or credit card accounts.*
- ☐ *Notify utility companies and cable and internet providers.*
- ☐ *Determine if there are any bills that must be paid immediately.*
- ☐ *Contact the Post Office to make any necessary changes in mail delivery.*
- ☐ *Obtain last hospital bill, if needed for estate settlement.*
- ☐ *Make an appointment with an attorney to discuss the estate.*

Notify Government Agencies:

- XX** Social Security Administration; 800-772-1213
(Glunt Funeral Home and Crematory, Inc. will take care of this for you.)
- ☐ Veterans Administration; Erie VAMC 814-868-8661 (or contact the facility where decedent was cared for).
- ☐ Defense Finance and Accounting Service; 216-522-6680 (for military retiree receiving benefits)
- ☐ Office of Personnel Management; 888-767-6738 (for retired or former federal civil service employee)
- ☐ U.S. Citizenship and Immigration Service; 800-375-5283 (if decedent was not a U.S. citizen)

Number of original death certificates needed _____

***If additional death certificates are needed,
Glunt Funeral Home and Crematory, Inc. can assist.
814-734-1611***



CHECKLIST TWO

Within One Month:

- ☐ *Notify all bank and lending institutions of the death. Take a certified death certificate with you to each location.*
- ☐ *Gather and organize financial documents and, where applicable, obtain account balances as of the date of death. These may include:*

Bank statements; annuity and mutual fund statements

Certificates of Deposit

Stock certificates

Promissory notes under which decedent was entitled to receive payment

Deeds to real property owned by decedent

Titles to property, such as motor vehicles, trailers and mobile homes

Appraisals for jewelry or other valuable property owned by the decedent

- ☐ *Gain access and inventory the contents of any safe deposit boxes.*

(Bring the above documents, credit and loan balances, final hospital bill, death certificate, Last Will and Testament, and safe deposit box inventory to your meeting with the attorney.)

- ☐ *Notify the decedent's accountant, CPA, or bookkeeper of the death.*
- ☐ *Notify the State and/or County Board of Elections, if decedent was a registered voter. www.voterreg@eriecountygov.org or call (814) 451-6275.*
- ☐ *Write Acknowledgement Cards, thanking those whose expression of sympathy went beyond paying respects at the funeral home. (See the following page for helpful tips to Acknowledgement Card etiquette.)*

Acknowledgement Card Etiquette

In the first few weeks following a funeral, it is customary to acknowledge those whose expression of sympathy went beyond paying respects at the funeral home. In most cases, a simple, signed Acknowledgement Card, such as those available in our Memorial Package, is an acceptable way to convey your appreciation for flowers, Mass cards, sympathy cards and memorial gifts. You may, however, choose to write a more personal note for specific gifts, services or special words expressed about your loved one. Here are some suggestions for expressing your thanks:

To Clergy: *Send a more formal, personal note of thanks for their spiritual support. If sending an honorarium or offering, it should be sent in a separate mailing.*

To Bearers: *Include a message of thanks for their time and service, and perhaps their special relationship to the decedent.*

Flowers and Gifts: *If received from a formal group or organization, a single card may be sent to the overall group, with a personal note referencing all members. If member names are listed on the card, an Acknowledgement Card should be sent to each name that appears (you do not need to include a personal message). The same would apply to an informal group, such as neighbors, co-workers, etc.*

Sympathy cards – *An Acknowledgement Card is sufficient, but if there is a personal message in the card you've received, you may want to offer a more personal reply.*

****Anyone who has provided food, or a helpful service outside of the funeral home, should receive a personal note of thanks in an Acknowledgement Card.**

PLEASE NOTE: *Emails and text messages are not considered appropriate for the expression of gratitude.*



CHECKLIST THREE

Within two to six months;

- ☐ *If automobiles are held jointly, change motor vehicle registration to reflect ownership by only the surviving joint tenant.
Contact Boro Notary, LLC, (814) 250-2676 (or the agency of your choice), to help with filing.*
- ☐ *If the decedent held a valid driver's license or State issued ID, mail a death certificate to:*

*PA Department of Transportation
Bureau of Driver Licensing
P.O. Box 68615
Harrisburg 17106-8615*
- ☐ *If stocks or bonds are held jointly, contact the broker or account manager to change records to reflect ownership by only the surviving joint tenant.*
- ☐ *Cancel any auto-renew or recurring subscriptions the decedent may have had, such as internet protection, shopping clubs (such as Prime), etc.*
- ☐ *Notify professional associations and unions.*
- ☐ *Cancel any paid club memberships or subscriptions, including health and athletic clubs, automobile clubs, etc.*
- ☐ *Notify civic organizations where the decedent may have been a member.
(Rotary, Kiwanis, VA, etc.)*

- ☐ If you wish, you can list the decedent on the **Deceased Do Not Contact List** maintained by the Direct Marketing Association, by registering online at www.ims-dm.com/cgi/ddncc. (Fees may apply)

Advise the three national credit reporting companies of the death and instruct them to list all accounts as "Closed - Account Holder Deceased." At this time, you may also choose to request a credit report, which will provide you with a list of all creditors and recent activity.

Experian

P.O. Box 4500
Allen, TX 75013
888-397-3742

Equifax

P.O. Box 105139
Atlanta, GA 30348
800-525-6285

TransUnion

P.O. Box 2000
Chester, PA 19022-2000
800-680-7289

When requesting this information, it is important to include the following:

- *Your name, address, phone number, and your relationship to the decedent
(Be sure to note that you are the personal representative of the estate)
- *The decedent's full name
- *Date of death
- *Date of birth and birthplace
- *Social Security number
- *Any addresses decedent may have had in the five years prior to death



Healing Resources

If you are overwhelmed by the emotional stress and grief that comes after the loss of a loved one, you are not alone. We have put together the following list of local support groups you may wish to contact.

Griefshare offers support through group counseling and seminars led by people who understand what you are going through. Call or visit them online to find groups that meet near you. Additional support is also available on their website.

(800) 395-5755

www.griefshare.org

Many local hospice agencies offer grief counseling to help you navigate through that difficult first year. Here are a few you may wish to contact:

Asera Care Hospice

(814) 836-5255

www.aseracare.com

Heartland Hospice

(814) 878-5990

www.heartlandhospice.com

Great Lakes Hospice

(814) 877-6120

Erie Catholic Diocese, Catholic Charities offer a variety of groups that provide a safe place for healthy grieving. All faiths are welcome.

(814) 824-1111

www.eriercd.org

The Caring Place offers support to children coping with loss.

510 Cranberry Street

Erie, PA 16507

(814) 871-6868

www.highmarkcaringplace.com

*Several local groups meet regularly to help cope with the **loss of a child**.*

Emma's Footprints

(814) 464-5989

Empty Arms

(814) 774-7064

www.emptyarmserie.org

Lucy's First Step

(914) 969-1267

lucysfirststep@gmail.com

Survivors of suicide can find comfort sharing with others who have experienced the same type of loss.

P.A.L.S.

People After Loss from Suicide

(814) 824-1257, 825-9437 or 864-2428

www.ErieRCD.org

Survivors of Suicide Support Group

www.UPMCHamot.org/SafeHarbor

T.A.P.S. - Tragedy Assistance Program for Survivors

Grief support for military families.

www.taps.org

Crime Victim Center of Erie County offers individual and group counseling for those who have lost loved ones to violent crime.

(814) 455-9515

Edinboro Methodist Church - A support group for those dealing with loss/grief meets at Edinboro United Methodist Church. Dave Heidecker of Hospice of Metropolitan Erie facilitates, with Rev. Rand Edwards providing pastoral support.

Contact the church office at (814) 734-3182.



Disclaimer

This pamphlet contains helpful estate planning information and data to assist you following a funeral service or the death of a loved one. It is not a substitute for the advice of an attorney. This guide provides basic information about the law, as it applies to post death notifications and details, which may change from time to time and become outdated.

We cannot and do not provide specific information for your exact situation, and we cannot decide whether our pamphlet's suggestions are appropriate for you. Because we cannot decide which suggestions are best for your individual needs, you must use your own judgement and, to the extent you believe appropriate, the assistance of an attorney.