After the Funeral Service Checklist

# Immediate Tasks

☐ Send thank-you notes for flowers, donations, meals, and support

☐ Arrange for collection/return of floral arrangements, plants, or keepsakes

☐ Distribute memorial cards, photos, or keepsakes to family/friends (if applicable)

☐ Ensure personal belongings are retrieved from funeral home, hospital, or care facility

# Financial & Legal Matters

☐ Obtain multiple certified copies of the death certificate

☐ Notify Social Security Administration

☐ Contact life insurance companies to file claims

☐ Contact pension, retirement, or veterans’ benefits offices to file claims

☐ Notify banks, credit unions, and financial institutions

☐ Cancel credit cards or transfer accounts as needed

☐ Update deeds, titles, and property ownership records

☐ Meet with attorney regarding will, trust, or estate administration

# Household & Personal Affairs

☐ Cancel or transfer utilities, subscriptions, and memberships

☐ Redirect or forward mail through the post office

☐ Cancel or transfer phone, internet, and cable accounts

☐ Arrange care for pets, if needed

☐ Secure or transfer firearms, valuables, or important possessions

# Ongoing Matters

☐ Arrange monument or headstone inscription/placement

☐ Consider grief counseling or support groups

☐ Organize and preserve photographs, videos, and personal items

☐ Hold follow-up memorial gatherings or anniversaries of remembrance

☐ Review and update your own estate planning documents