

Post-Loss Administrative Checklist

Immediate Notifications & Arrangements

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Organ Donor Information			
<input type="checkbox"/>	Contact Mortuary			
<input type="checkbox"/>	Contact Relatives			
<input type="checkbox"/>	Contact Friends			
<input type="checkbox"/>	Contact Mortuary			
<input type="checkbox"/>	Death Notice in Newspaper			
<input type="checkbox"/>	Write Obituary			
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Essential Documents

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	# of Original Death Certificates (order sufficient copies)			
<input type="checkbox"/>				
<input type="checkbox"/>				

Investments & Retirement

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Contact Investments/IRA			
<input type="checkbox"/>	Contact Stock Accounts / Brokerage			
<input type="checkbox"/>	Contact the pensions department			
<input type="checkbox"/>				

Legal Documents & Government Agencies

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Obtain/Review Birth Certificates			
<input type="checkbox"/>	Contact Social Security			
<input type="checkbox"/>	Contact Medicare			
<input type="checkbox"/>	Contact OPM Retirement			
<input type="checkbox"/>	Letter to Hospital ER			
<input type="checkbox"/>	Letter to Primary Doctor(s)			
<input type="checkbox"/>	Contact the County regarding probate			
<input type="checkbox"/>	Contact the Elections Board			
<input type="checkbox"/>	Find and review Will			
<input type="checkbox"/>				
<input type="checkbox"/>				

Financial Assets & Accounts

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Find Life Insurance Policies / Stop premium payments			
<input type="checkbox"/>	Contact Bank(s) and Review Financials			
<input type="checkbox"/>	Remove name on Accounts (after one year)			
<input type="checkbox"/>	Add child(ren) to accounts			
<input type="checkbox"/>	Mortgage Title/Name Change			
<input type="checkbox"/>				
<input type="checkbox"/>				

Credit, Vehicles & Personal IDs

<input checked="" type="checkbox"/>	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Contact all Credit Card Companies			
<input type="checkbox"/>	DMV – Driver’s License, Registration & Auto Title changes			
<input type="checkbox"/>				

Medical & Insurance

<input checked="" type="checkbox"/>	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Cancel Medical Appointments			
<input type="checkbox"/>	Contact Health Insurance			
<input type="checkbox"/>	Contact Auto Insurance			
<input type="checkbox"/>	Return unopened medication			
<input type="checkbox"/>				
<input type="checkbox"/>				

Safety Deposit & Personal Property

<input checked="" type="checkbox"/>	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Find Safety Deposit Key			
<input type="checkbox"/>	Itemize & update Safety Deposit Box contents			
<input type="checkbox"/>	Add child(ren) to Safety Deposit Box access			
<input type="checkbox"/>				
<input type="checkbox"/>				

Correspondence & Memorial Items

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Contact Mortuary			
<input type="checkbox"/>	Write Obituary			
<input type="checkbox"/>	Ashes/burial arrangements			
<input type="checkbox"/>	Prepare funeral publications			
<input type="checkbox"/>	Order flowers			
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Miscellaneous

✓	Task	Telephone	Assigned to	Notes
<input type="checkbox"/>	Take Death Certificate to cell phone provider			
<input type="checkbox"/>	Death Notice in Newspaper			
<input type="checkbox"/>	Send Thank You Letters/Cards			
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				