



CHECKLIST

Upon A Loved One's Passing

- Check for burial instructions or a deed to a burial plot or pre-need burial fund. Gather those documents**

- Check for a Will in your loved one's possession (or located in a safe deposit box)**

- Order 6-8 copies of the death certificate from the funeral home**

- Contact Social Security or any gov't agency to inform them of your loved one's passing. Do NOT deposit any checks issued after date of death**

- Contact any Pension or Retirement accounts to inform them of your loved one's passing. Do NOT deposit any checks issued after date of death**

- Keep a copy of the funeral bill showing that it has been paid in full**

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