

THINGS TO DO FOLLOWING THE FUNERAL SERVICE

Mark each item as you complete this checklist:

- _____ 1. Received certified copies of Death Certificate.
- _____ 2. Acknowledgment cards written and sent.
- _____ 3. If any assets were in the deceased's name alone, without a beneficiary, meet with Lawyer to commence probate proceeding. Provide Lawyer with the original Will and Certified Copy of the Death Certificate.
Recommended Attorney: Ronald D. Keener Co. LPA, (937-687-1388)
- _____ 4. Notify Insurance Companies and file claims when applicable.
 - A. Life Insurance (Our funeral home may already be helping you)
 - B. Medical, Health, Disability, Travel and Accident
 - C. Pension Benefits
- _____ 5. Employer of deceased notified/Employer pension benefits reviewed.
- _____ 6. Vehicle Title Transferred.
- _____ 7. Car Insurance Changed.
- _____ 8. Apply for appropriate benefits when applicable.
 - A. Social Security Survivor Benefits (1-800-772-1213)
 - Local Office -200 W 2nd St #209, Dayton, OH 45402
 - B. Veteran's Burial and Survivor Benefits (Funeral Home will assist you)
 - C. Workmen's Compensation Benefits
 - D. U.S. Government of Civil Service, Retired (1-888-767-6738)
- _____ 9. Notify Stockbroker.
 - A. Change ownership of joint or solely owned stocks
 - B. Cancel any open orders arranged by the deceased
- _____ 10. Notify Bank.
 - A. Change all jointly held accounts and correct tax identification numbers (usually Social Security Number).
 - B. Cancel direct deposit retirement benefit payments
 - C. Re-establish title of safe deposit box
 - D. Apply for any credit life insurance which may exist
- _____ 11. Credit Card Companies notified.
- _____ 12. Appointments, made by the deceased, canceled. Return any Medical Equipment to store/agency.
- _____ 13. Notify Schools, Colleges, etc., about the death.
- _____ 14. Notify personal lists at home. (Cards, magazines, etc.)
- _____ 15. Cemetery Memorial/Headstone ordered.
- _____ 16. Personal Pre-Planning of Funeral Arrangements with the Funeral Home to ease decision making and financial responsibility on your family when death occurs.
- _____ 17. Other _____.