

Initial Communication Steps Following a Death

- Notify family and friends.
- Contact the funeral home or cremation society.
- Contact their employer if they are still working.
- Notify their attorney.
- Arrange care for pets if needed.
- Determine if they were an organ donor.

Planning the Burial or Cremation

- A funeral (body in casket) or memorial?
- A church or a synagogue?
- Grave site or nothing if that's what the decedent wanted?
- Arrange for an officiant.
- Order flowers.
- Plan music and spiritual readings for the ceremony.
- Create the program.
- Select a charity for donations.
- Identify individuals to do eulogies.
- Pick up thank you cards.
- Will there be food after the service?
- Will there be a burial at a cemetery?
- Will there be a columbarium for cremains?
- Will there be a headstone?
- If the decedent was part of the military, they may qualify for military honors at the funeral.
- Where will the remains be interred?
- Will burial be in a different state? (You may need to arrange for a second funeral home.)
- Write and submit the obituary.

Additional Considerations

- Look for preneed funeral insurance.
- Gather bills that need to be paid.
- Change the locks on the house.
- Remove valuables for safe storage.
- Keep the utilities and the insurance active if the house is to be sold.
- Notify the investment advisor and cancel credit cards.
- Order 10+ death certificates to assist with closing accounts.
- Find the original will or trust, and contact a probate attorney.

Be Kind to Yourself as You Grieve.

Visit actec.org/estate-planning for more critical resources.

Because each individual's circumstances vary, contact your attorney to discuss how these items may or may not be appropriate for your situation.