

# *Vsy Accountancy Corporation*

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## WHAT TO DO WHEN A LOVED ONE DIES

(Place "X" on left side when done, cross out if not applicable)

### What To Do Immediately:

- O1 Gather family members. Plan, organize, delegate. Agree on one main contact person.
- O2 Prepare lists of records to gather, tasks to do, people to contact. Establish responsibilities.
- O3 Establish dates & locations of:
  - OA Viewing \_\_\_\_\_
  - OB Interment \_\_\_\_\_
  - OC Reception \_\_\_\_\_

### Who To Inform:

- O1 Family members \_\_\_\_\_
- O2 Close friends \_\_\_\_\_
- O3 Employer \_\_\_\_\_
- O4 Trustee, executor \_\_\_\_\_
- O5 Pastor, minister, priest, rabbi \_\_\_\_\_
- O6 Doctor, attorney, accountant \_\_\_\_\_
- O7 Life insurance agent \_\_\_\_\_

### What To Bring For Funeral Arrangements:

- O1 Photograph that shows hairstyle. \_\_\_\_\_
- O2 Memorial tablet inscription \_\_\_\_\_
- O3 Birth certificate. \_\_\_\_\_
- O4 Before-need contract. \_\_\_\_\_
- O5 Military discharge papers. \_\_\_\_\_

### What To Select:

- O1 Memorial park \_\_\_\_\_
- O2 Casket/vault \_\_\_\_\_
- O3 Memorial tablet \_\_\_\_\_
- O4 Photo for embalmer. \_\_\_\_\_
- O5 Photo to be enlarged for services \_\_\_\_\_
- O6 Clothing for deceased \_\_\_\_\_
- O7 Clothing for family members \_\_\_\_\_
- O8 Casket bearers \_\_\_\_\_
- O9 Speakers at service \_\_\_\_\_
- O10 Scriptures & readings \_\_\_\_\_
- O11 Photographer \_\_\_\_\_
- O12 Videographer \_\_\_\_\_
- O13 Music \_\_\_\_\_
- O14 Flowers \_\_\_\_\_

### What To Do After Burial:

- O1 Gather records. \_\_\_\_\_
- O2 Meet with lawyer \_\_\_\_\_
- O3 Meet with CPA \_\_\_\_\_
- O4 Meet with insurance agent \_\_\_\_\_
- O5 Visit nearest Social Security office \_\_\_\_\_
- O6 Identify special needs of family members. \_\_\_\_\_
- O7 Plan to safeguard assets especially life insurance proceeds. \_\_\_\_\_
- O8 Get > 20 copies of death certificate. You'll need more certificates than you think. \_\_\_\_\_

