



WHAT COMES NEXT?

STEPS TO TAKE AFTER YOUR LOVED
ONE HAS PASSED

Bear Valley Hospice, LLC
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STEPS TO TAKE AFTER YOUR LOVED ONE HAS PASSED

The passing of a loved one is incredibly difficult and especially overwhelming for those responsible for handling funeral arrangements, personal affairs, and finances. Bear Valley Hospice provides access to a Social Worker who is available to support you through this process. We have also developed this checklist to help keep you on track with things that need to be taken care of after your loved one passes.

YOUR CHECKLIST

This checklist is organized in a timeline format to ensure that tasks are completed in order of time sensitivity. Tasks can be divided up by family members or friends to alleviate some of the stress from any one person. Please note that some of these tasks will need to be completed by the executor of the will or estate. If you are not the executor, you will want to work closely with that person.

Please do not hesitate to reach out for support through this process- we are here to help!

THE FIRST COUPLE OF DAYS

NOTIFY CLOSE FRIENDS & FAMILY



The first step is to get in touch with the close friends and family members of your loved one to notify them of their passing.

We also recommend evaluating the emotional impact on the surviving family and friends and arrange for support as necessary.

CONTACT ORGAN DONATION AGENCY



Organ donation is very time sensitive so you will need to act quickly!

Check your loved one's driver's license or advanced directive to confirm whether or not they wanted to donate their organs.

If so, contact OneLegacy to make arrangements:
800-338-6112 or visit onelegacy.org

THE FIRST COUPLE OF DAYS



ORDER DEATH CERTIFICATES

You will want to order between 5 and 10 copies depending on how many accounts your loved one had open. Certificates can be ordered through the funeral director during the planning process or through the county clerk at a later date.



ARRANGE CARE FOR DEPENDENTS

If your loved one was responsible for caring for any dependents or pets, you will need to make temporary arrangements as quickly as possible until long term arrangements can be made.



SECURE RESIDENCE AND PROPERTY

If your loved one was living alone in their own home, make sure that the house is locked as well as any vehicles, sheds, garages, etc.

If the property will be vacant for an extended time, consider asking neighbors, landlords, or the local sheriff department to keep an eye on it.

OVER THE NEXT WEEK

FORWARD MAIL & HOME DELIVERIES

If your loved one lived alone, get in touch with USPS and other home delivery services to cancel or forward all mail and deliveries. This will help you keep track of bills and other accounts that will likely need to be cancelled in the future.

You will need to fill out an official request form at the Post Office and provide a copy of your loved one's death certificate.

REMOVE PERISHABLE ITEMS

You'll want to do a complete and thorough walk through of your loved one's home if they were living alone. Make sure to clean out the refrigerator and donate or discard any food that may expire. Check for house plants or anything else that might need regular care as well.



OVER THE NEXT WEEK



APPLY FOR POTENTIAL BENEFITS

You or your loved one may be entitled to certain benefits that help with funeral and burial costs. Contact employers, social security, and any unions that your loved one may have been involved with to verify.

If your loved one was a veteran, visit benefits.va.gov for more information about veteran's benefits.



MAKE FUNERAL ARRANGEMENTS

You can find helpful funeral planning resources at everloved.com such as discounted urns and caskets, resources for writing an obituary, and the option to create a memorial website. Ever Loved also provides a crowdfunding feature to help cover the costs of a funeral or memorial.

Keep records of all expenses as you may be entitled to reimbursement from any potential benefits. Funeral planning can be very overwhelming and emotional so make sure to involve friends and family to help with completing tasks and providing support!

WITHIN THE NEXT FEW WEEKS

START THE PROBATE PROCESS

Review your loved one's will and decide whether or not you'll need to hire a probate lawyer to help with carrying out your loved ones wishes.

NOTIFY FINANCIAL INSTITUTIONS

Notify all applicable agencies such as: banks and mortgage companies, financial advisors or brokers, tax accountants, life insurance companies, credit reporting agencies, etc.

It is important to notify these types of agencies in order to avoid fraud or identity theft!

CANCEL AND CLOSE ACCOUNTS

Cancel or close insurance policies, credit card accounts, driver's license, email accounts or any other accounts or methods of identification in order to prevent identity theft or fraud!

You can also memorialize your loved ones social media accounts.



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