

## HANDLING THE ARRANGEMENTS FOR SOMEONE WHO HAS DIED

When a person dies, someone is named to handle the funeral arrangements and/or estate matters. They are usually called "Executors" or "Trust Managers." We have prepared a checklist to assist you as you take on this responsibility. Obviously the initial steps are to either carry out the instructions of the deceased, or make those arrangements if they have not been made prior to death. This is a trying time for all who are involved. We hope this checklist assists you in your important and honored work.

### Locate Estate Documents

- The first step in handling the affairs of a deceased family member or friend is to locate and **review any legal paperwork** that the deceased completed before their passing. They may have given you a copy of their paperwork or granted you access to it. **Retrieve those documents** and review them thoroughly.
- You will need to have proof that you have been put in charge of the affairs of the deceased. **Keep a photocopy of the Estate Documents with you** and be prepared to show that you have Power of Attorney, or been named as Executor, etc.
- After you have been notified of the deceased's death, you must decide **which funeral home/mortuary will handle the body**. This choice must be communicated to the service who was caring for the person: hospice, hospital, nursing home, etc. If the body is in the custody of the Coroner or Medical Examiner, you will have to notify them of the same, prior to releasing the body.
  - ❖ *If the deceased has previously made and or paid for mortuary services, this process will be one of simply notifying the funeral home /mortuary previously selected.*
- Hopefully, the deceased included a **contact list** of family members and/or friends who should be notified of their death. If not, create a contact list and proceed to notify them. You can also let them know which funeral home/mortuary is handling the arrangements. Notify them of the timing of funeral, if one is planned. (You don't have to have a firm date, just a general notice of ...."Funeral to be held this week.....We will let you know when, etc.")

## Funeral Planning and Logistics

- Notify the funeral home/mortuary that you would like 10-15 original copies of the **death certificate**. You will need these to carry out many estate functions.
- The funeral home/mortuary will need to know about the deceased's specific **funeral arrangements** or directions. Hopefully, the deceased will have made those arrangements previously, if not, then it will be up to you to make those arrangements.
- Is the body to be **buried or cremated**?
- Is a **funeral** to be held? Is it to be an open or closed casket service?
  - ❖ If open casket (and it does not conflict with religious preferences) then the body will mostly likely need to be embalmed.
- Where is the interment** (burial or placement of ashes) to take place? Are cremated **remains to be scattered**? Where?
- If burial is take place, a **selection of a casket** will need to be made. (You can order caskets online [see Resource page] and *the funeral home must accept delivery at no additional handling cost.*)
- Select a **date and time for funeral / interment**.
- Write and submit an obituary**. Did the deceased write this before dying or give directions regarding the obituary? If no directions were left, this task is usually carried out by members of the family.
- Headstone/grave marker**? Was there an inscription preferred? If not, one must be written out with a style and design selected. (This actually can wait. Grave markers are usually placed sometime after the burial. No need to rush.)
- Are there special needs for the burial ceremony? Military? Religious?
- If a funeral was preferred, who will participate in the funeral service? Who will deliver the **eulogy**? (see eulogy in Glossary for help writing this)
- Was a charity selected "**in lieu of flowers**"? (see Resource page)
- Was a **wake or memorial party** preferred instead of a funeral?

## **Estate Issues**

There are many tasks that need to be completed to “close out” the affairs of someone who has died. In some cases, hiring an accountant or legal advisor would be recommended. Depending on the complexity or size of a person’s estate, you may be able to handle this yourself or, you may need to seek professional help and consultation.

## **Documents to locate**

*Collect the deceased’s:*

- Social Security Card
- Driver’s License
- Birth Certificate
- Safety Deposit Box info/keys
- Life Insurance Certificates
- Previous Tax Returns
- Marriage License
- Military Discharge Papers (if former military)
- Credit Cards
- Property Deeds
- Bank/Check Books
- Bank Statements
- Pension or Retirement fund info
- Divorce Papers (if divorced)
- Any Business Ownership paperwork
- Stocks, Bonds or Other investment documents
- Title to Motor Vehicles

***Handling the arrangements for someone who has died –whether expected or not—takes a lot of time and energy to complete. It is a very important responsibility to carry out the plans, wishes, directions and desires of another. If you have to make those decisions without guidance, it can be a very demanding process. We hope you have found this checklist helpful. We sincerely wish you success in your efforts.***

***If you have additions or suggestions for this checklist, please contact us via the website [OKtoDie.com](http://OKtoDie.com) OR email us at [Info@oktodie.com](mailto:Info@oktodie.com).***

*This list is not all inclusive. You should consult with professionals in the area of finances, law and estate matters.*