



Aloha Funeral Home ~ Crematory

SURVIVOR CHECKLIST

THIS IS A GENERAL GUIDELINE; NOT ALL ITEMS WILL APPLY TO EVERY INDIVIDUAL

Immediately following the death, you should:

- Contact hospice or non-emergency dispatch for your county to pronounce that the death has occurred.
- Contact the funeral home to transport your loved one into their care and inform them of the type of services and when the family is wanting to schedule services before proceeding with plans.
- Alert immediate family members and close friends.
- Arrange for the care of any dependents or, if the deceased had any pets, arrange for their immediate care.
- If deceased or family is a member of a church, contact your clergyperson.
- If applicable, notify the Power of Attorney and alert the executor of your loved one's will.
- If employed, contact the decedent's employer.
- Remove any valuables from your loved one's home, secure the residence, and take steps to make the home appear to be occupied.
- Arrange for the disposal of any perishables left in your loved one's home – such as food, refrigerated items, and existing refuse.
- Alert the Post Office to forward your loved one's mail and remove name from marketing and mailing lists.
- Notify fraternal and civic organizations that your loved one was a member of.
- Locate and/or obtain your loved one's important documents, including:
 - Will, birth certificate, social security card, marriage license, military discharge paperwork (DD-214), deed to burial property, copy of funeral home pre-arrangements, life insurance policies, real estate deeds and titles, stock certificates, loan paperwork, banks and retirement account statements, last four years of tax returns. Notify your funeral home of how many certified death certificates you may need.
- Compile the vital statistic information that the funeral home will need in order to finalize the death certificate. (An online submission & printable version may be found at www.springerandson.com)
- If your loved one was a veteran, compile the following information that the funeral home will need in order to verify any veterans' benefits and/or placement at a National Cemetery, including the following information from the DD-214:
 - Entered service date; entered service place; service number; separated from service date; separated from service place; grade, rank, or rating; organization and branch of service.Further information may be found at <https://www.va.gov/opa/persona/dependentsurvivor.asp> or by calling the Department of Veteran's Affairs – 1-800-827-1000

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Within one month of the death, you should:

- Your funeral home will notify the Social Security Administration when filing the death certificate. However, you may contact the Social Security Administration and any other government offices that may have been making payments to the decedent. If the decedent was your spouse, inquire about your eligibility for new benefits. Further information may be found at www.ssa.gov/pgm/linkssurvivor.htm or you may contact them directly at [Social Security Administration](http://www.ssa.gov/pgm/linkssurvivor.htm) – 1-800-772-1213
- Consult with an attorney regarding probate of the estate.
- Meet with an accountant to discuss estate taxes.
- File claims with life insurance companies. Traditionally, life insurance companies require only two documents to establish proof of a claim: A Claimant's Statement and the Certificate of Death (or Attending Physician's Statement). Remember, though, that this is just a general statement and your insurance companies reserve the right to request further information or proof, if they deem it necessary.

When filling out the claim form, you should have the following information available:

- The policy number(s) and face amount(s); the full name and address of the deceased; his/her occupation and last date worked; his/her date and place of birth and the source of birth information; date, place, and cause of death; claimant's name, age, address, and Social Security number.

There are several ways of settling insurance claims. In most cases, you may opt for a lump sum benefit, or you may choose to have the money paid to you over a time period of your choice. In the latter case, the bulk of the money remains with the insurance company and continues to gather interest. In either case, check with your insurance agent, financial advisor or attorney to find out which method would be most beneficial for your particular situation.

- Contact the deceased's employer. Inquire about any 401(k) or 403(b), pension, or company benefits that the decedent may be entitled to.
- If the deceased's home is unoccupied, cancel unnecessary home services, such as newspaper delivery, cable service, internet, food delivery, cleaning, landscapers, garbage and recycling, etc...
- Contact the Department of Motor Vehicles to cancel deceased's driver's license and transfer titles of all registered vehicles.
- Cancel the decedent's prescriptions.
- Notify the Registrar of Voters.
- Obtain a current copy of the deceased's credit report. Notify all three credit reporting agencies. [Equifax](http://www.equifax.com) - 1-800-685-1111 www.equifax.com; [TransUnion](http://www.transunion.com) - 1-800-888-4213 www.transunion.com; [Experian](http://www.experian.com) - 1-888-397-3742 www.experian.com. Advise all creditors in writing that a death has occurred.
- Obtain copies of deceased's outstanding bills. Change ownerships of assets and lines of credit.
- Check for any life insurance benefits available through existing credit card or loan accounts.
- Update your own life insurance policies and will to name a new beneficiary, if necessary.
- If the death was accidental, verify whether benefits are available on existing insurance policies.
- File any outstanding claims for health insurance or Medicare benefits.
- Send acknowledgement messages for any flowers, donations, food, or significant gestures of kindness.
- Organize and distribute decedent's personal belongings.