



FAREWELLING CHECKLIST: THE FAREWELLING 5

PLANNING FOR SOMEONE WHO HAS DIED



If you're planning a farewelling now for someone who has died, we understand this is a difficult time. We hope you'll use this checklist to streamline your planning and help you personalize. We've divided the tasks and elements into the five most important sections to make it more manageable, and if you find you want more info, you can visit the myfarewelling.com site for the clickable version of this list. We also have detailed provider listings on the site in case you need to find a funeral home.

2. WELL DOCUMENTED: **IMPORTANT RECORDS**

Depending on your situation, you'll need some combination of the below, so hopefully this list will be helpful as you plan. It can be good to gather documents you do have into one central file for safekeeping.

- Organ Donation Paperwork
- Farewelling File/Funeral Plans
- Identification Documents (Drivers License, Passport, Birth Certificate)
- Social Security Card
- Marriage Certificate and/or Divorce Record
- Last Will and Testament
- Statements for Bank, Retirement, Investment, Credit and Loan Accounts
- Passwords and Pin Codes to all Accounts
- Deeds or Proof of Ownership for Home, Car, etc.
- Business-related Documents
- Insurance Policies
- 10 copies of the Death Certificate (request these from your funeral director (you may need them to access accounts, etc.))

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3. WELL PLANNED: THE SERVICE AND CELEBRATION

This is a chance to honor your loved one in a personal, beautiful way, taking into account their wishes, their values, and even their style. Remember that ceremony and ritual may help us to heal. Often there are at least two parts to a funeral: the service and a celebration or gathering following (or in place of) the service.

- Share wishes/plan timing/personalize the service with your chosen funeral director
- Notify Veterans Administration to receive funeral benefits if applicable
- Confirm the funeral service format (religious, non-traditional, eco-friendly)
- Contact officiant/celebrant/religious leader
- Select personal readings for the service
- Choose and coordinate anyone who will speak at the service
- Write eulogy or speech
- Select any desired flowers for the service
- Choose music for the service and/or related celebrations
- Create a program or prayer card for the service
- If desired/permitted, select food and drinks for service
- Choose and pack your loved one's clothing and any accessories for the service (include any items that will be buried with them)
- If you'll have a celebration (pre- or post-service or in place of a formal service) to honor your loved one, choose a venue
- Select food and drinks
- Add personal details to the celebration
- Share details (times/venues, etc.) for all events with family, friends, and loved ones
- Appoint someone to bring items to the service and celebration
- Arrange any special transportation (limos, etc.)

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4. WELL ORGANIZED: ALL THE PRACTICALITIES

We've listed the below tasks in order of priority. The first may be more pressing, while the others can likely wait a bit till you have the time. Do check for any documents you may need under the Well Documented section of this checklist, as those might be required when closing out accounts, etc. Note that not every one of these items will necessarily apply in your planning.

- Collect any personal items from the hospital/hospice
- Put a hold on active credit cards as soon as you can
- Make sure their home is secure
- Are there pets? If so, arrange for their care
- File any claims for pre-paid funeral expenses or life insurance
- You'll likely want to notify important contacts:
 - Personal and/or Business Attorney
 - Workplace colleagues
 - Landlord
 - Member organizations (military, volunteer, civic, religious, etc.)
 - Car companies to cancel lease
 - Department of Motor Vehicles
 - Social Security administration
 - Insurance providers
 - Other ongoing service providers (telephone, cable, cell phone, automatic prescriptions, etc.)
 - Voter Registration Office
 - US Post Office
- Organize any details regarding their home
- Close bank, investment, and retirement accounts
- Settle debts and credit accounts
- Cancel subscriptions to newspapers, magazines, streaming services, home deliveries
- File a final tax return
- Complete the processing of the will and distribution of any assets
- After the will has been processed (this can take time), donate, store, sell or give away any applicable items.



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