Funeral planning checklist

A list to work through in order. Cross out what does not apply.

In the first hours

- [ ] If the death was unexpected and at home, call 911. If hospice was involved, call the hospice nurse
- [ ] Tell close family and friends by phone
- [ ] Find any written wishes, a will, or a prepaid funeral contract
- [ ] Arrange care for children, dependents and pets
- [ ] Lock the home and bring in the mail

Choosing a funeral home

- [ ] Call two or three and ask for prices. They must give prices by phone
- [ ] Ask for the General Price List, which itemizes every charge
- [ ] Decide on burial or cremation
- [ ] Choose only the goods and services you want. You do not have to take a package
- [ ] Ask for a written statement of the total before you pay

Papers to gather

- [ ] Full legal name, date and place of birth
- [ ] Parents' names, including mother's maiden name
- [ ] Social Security number
- [ ] Military discharge papers (DD Form 214), if a veteran
- [ ] A recent photograph
- [ ] Clothing for the burial or viewing

Funeral planning checklist, continued

Planning the service

- [ ] Choose the kind of service, the place, the day and the time
- [ ] Ask someone to lead it
- [ ] Choose music, readings and speakers
- [ ] Choose pallbearers, if needed
- [ ] Decide on flowers or a charity for memorial gifts
- [ ] Arrange a reception and who will bring food
- [ ] If a veteran, ask the funeral director to request military honors

Telling people

- [ ] Write the obituary
- [ ] Ask the newspaper for its price and deadline
- [ ] Send the service details by text, email or social media
- [ ] Tell the employer, the place of worship and any clubs

In the weeks after

- [ ] Order certified copies of the death certificate, ten or more
- [ ] Confirm that Social Security has been told
- [ ] See a lawyer about the will and the estate
- [ ] Tell banks, insurers, lenders and pension providers
- [ ] Claim life insurance and any veterans benefits
- [ ] Cancel subscriptions and close online accounts
- [ ] Send thank-you notes

This checklist is general guidance and not legal advice.