

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.

1. WELL LOVED: WHAT TO DO FIRST

NOTES:

If a loved one ho	as died, thes	e are likely th	ne first thir	ngs to c	deal with.	Use t	hese
guidelines to kee	ep you on tro	ack, and ask	for help v	where y	/ou need i	it.	

	Verify whether or not the person was an organ donor or wanted their body donated to science
	Find out if funeral arrangements were made in advance (often funeral plans are found in a will or in a separate folder from a local funeral home)
	If there is no will, determine whether any final wishes were shared
	If they've died at home and they were not under the care of a doctor or hospice, contact your local police
	If they've died in hospice or hospital, research a funeral home
	Contact your chosen funeral home and make initial decisions with your funeral director

2. WELL DOCUMENTED: IMPORTANT RECORDS

☐ Organ Donation Paperwork

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.

	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					
۵	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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5. WELL REMEMBERED: LEGACY MATTERS

		on is less about practicalities and logistics and more about staying connected emory of your loved one.					
		Write and submit an obituary					
	☐ Select/design memorial headstone or etching						
		Organize any donations in the person's name					
		Resolve social media and digital accounts					
		Write thank-you notes					
		Share your memories via photos and stories					
		Create traditions to honor and celebrate your loved one					
NOTES:							

