



***Immediate* Action Guide for Families**

What to Do Next?

Families often try to have too many people managing everything simultaneously. To save your family a tremendous amount of stress, miscommunication, and fatigue, we gently encourage you to appoint specific individuals to share these responsibilities:

- **Communications Coordinator:** Handles family notifications, phone calls, and updates.
- **Financial Coordinator:** Manages accounts, records, and automatic payments.
- **Funeral Coordinator:** Acts as the primary point of contact for the funeral home and cemetery.

Timeline of Care

*****First Hour*****

If Death Occurs at Home

- ☐ Call 911 (*if not under hospice care*)
- ☐ Contact hospice nurse (*if under hospice care*)
- ☐ Contact designated next of kin
- ☐ Locate pre-arrangement documents
- ☐ Contact funeral home
- ☐ Gather medications for disposal instructions

If Death Occurs at Facility

- ☐ Obtain contact information for facility representative
- ☐ Confirm funeral home selection with staff
- ☐ Notify immediate family
- ☐ Secure personal belongings

*****First 24 Hours*****

Family Notifications

- | | | |
|--|---|--|
| ☐ Notify spouse/partner | ☐ Notify children | ☐ Notify parents |
| ☐ Notify siblings | ☐ Notify closest friends | ☐ Notify employer |

Name/Relation:	Date Contacted:	Contact Information:	Notes:

Funeral Arrangements

- ☐ Locate clothing for deceased
- ☐ Locate glasses, jewelry, military items
- ☐ Gather photographs
- ☐ Locate cemetery deeds
- ☐ Locate military discharge papers (DD-214)
- ☐ Locate pre-paid funeral contracts
- ☐ Locate insurance policies
- ☐ Schedule arrangement conference

Protect Property

- ☐ Lock residence
- ☐ Collect spare keys
- ☐ Secure firearms
- ☐ Remove perishables
- ☐ Retrieve mail
- ☐ Arrange lawn care
- ☐ Arrange pet care
- ☐ Check refrigerators/freezers
- ☐ Secure valuables
- ☐ Verify home insurance remains active

*****First 72 Hours*****

Documents Needed:

- ☐ Social Security number
- ☐ Birth certificate
- ☐ Marriage certificate
- ☐ Divorce paperwork
- ☐ Military records
- ☐ Passport
- ☐ Insurance policies
- ☐ Vehicle titles
- ☐ Property deeds
- ☐ Trust documents
- ☐ Will
- ☐ Powers of attorney (for reference only; they terminate at death)

Financial Protection

- ☐ Identify recurring automatic payments
- ☐ Identify direct deposits
- ☐ Locate checkbooks
- ☐ Locate tax returns
- ☐ Secure financial records
- ☐ Identify financial advisor
- ☐ Identify accountant
- ☐ Identify attorney

First Week

Our team will help you order death certificates. As outlined in your *Glossary of Funeral Service Terms*, the state of Florida issues two distinct versions.

Determine quantity needed (Longform:_____, Shortform:_____)

Longform (<i>With Cause of Death</i>) Used strictly for medical, legal, and insurance-related matters. You will typically need this for:	Shortform (<i>Without cause</i>) Used for properties, assets, and general business matters. You will typically need this for:
Life Insurance (<i>One per company policy</i>)	One copy per deed of property, DMV (mobile home, car/truck/motorcycle, boat, trailer, etc.)
Annuities/pensions	Utility companies (Electric, Gas, Cable/Phone, Credit Card, P.O. Box)
Retirement/401(k)	Bank(s) (Checking/Savings/Trust Accounts, CDs, Safety Deposit Box, etc.) Even if another name is on account.
VA Benefits	Estate, if it is to be probated, Federal Income Taxes, if they are being filed
Investments	One per stock company of Mutual Funds, Varies by account, check with broker.

Government Notifications

- ☐ Social Security Administration (***Central Florida Casket Store and Funeral Chapel does this for you.***)
- ☐ Veterans Affairs (if applicable)
- ☐ Medicare
- ☐ Medicaid
- ☐ State retirement systems
- ☐ Pension administrators
- ☐ Disability benefits

Employment Benefits

☐ Notify employer

Inquire about:

- *Final paycheck*
- *PTO payout*
- *Life insurance*
- *Pension benefits*
- *Retirement plans*
- *Survivor benefits*

*****First Two Weeks*****

Digital Life Management

Email Accounts

- ☐ Locate account information
- ☐ Determine who will monitor accounts
- ☐ Save important contacts
- ☐ Preserve important messages

Social Media

- ☐ Facebook memorialization or delete
- ☐ Instagram memorialization or delete
- ☐ LinkedIn update
- ☐ X/Twitter closure
- ☐ TikTok closure
- ☐ Other accounts

Devices

- ☐ Cell phone
- ☐ Laptop
- ☐ Desktop
- ☐ Tablet
- ☐ External hard drives
- ☐ Cloud storage (photos/documents)

*****First Month*****

Financial Accounts

- ☐ Bank accounts
- ☐ Credit cards
- ☐ Investment accounts
- ☐ Retirement accounts
- ☐ Safe deposit boxes
- ☐ Loans
- ☐ Mortgages
- ☐ HELOCs

Subscription Audit

- ☐ Streaming services
- ☐ Cell phone
- ☐ Internet
- ☐ Utilities
- ☐ Newspapers
- ☐ Magazines
- ☐ Professional memberships
- ☐ Gym memberships
- ☐ Software subscriptions
- ☐ Cloud storage plans

Don't forget to check for:

- ☐ Airline miles
- ☐ Hotel rewards
- ☐ Credit card reward points
- ☐ Amazon account
- ☐ PayPal
- ☐ Venmo
- ☐ Cash App
- ☐ Zelle
- ☐ Cryptocurrency
- ☐ eBay seller accounts
- ☐ Etsy shops
- ☐ Domain names
- ☐ Website hosting
- ☐ YouTube revenue
- ☐ Facebook business pages
- ☐ Online businesses
- ☐ Storage units
- ☐ Firearms registrations (where applicable)
- ☐ HOA memberships
- ☐ Country club memberships
- ☐ Boat registrations
- ☐ RV registrations
- ☐ Timeshares

Family Care Checklist

Grief takes a massive physical toll. Please ensure you and your family are taking care of basic human needs today:

- ☐ Have family members eaten today?
- ☐ Have they slept or rested?
- ☐ Have they taken their prescribed medications?
- ☐ Are they drinking enough water?
- ☐ Have you allowed supportive friends to help you?