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## FAMILY CHECK LIST

We, at New Orleans Funeral and Cremation Service recognize that when a loved one passes, there are many tasks and details that must be completed to close out your loved one's business and accounts. Below is a "Checklist" of items that may or may not pertain to you and your loved one's situation. This is only a partial check list. You may need to complete additional tasks not listed below.

- \_\_\_\_\_ **Get a legal pronouncement of death** - If your loved one died in a hospital or nursing home where a doctor was present, the staff will handle this. An official declaration of death is the first step to getting a death certificate. It's a critical piece of paperwork. If your relative died at home, especially if it was unexpected, you'll need to get a medical professional to declare him/her deceased. To do this, call 911 soon after he/she passes and have him/her transported to an emergency room where he/she can be declared deceased and moved to a funeral home. *Get Certified Copies of Death Certificates as soon as available.*
- \_\_\_\_\_ **Arrangements:** Search the paperwork to find out if there was a prepaid burial plan. If not, you'll need to choose a funeral home and decide on specifics like where the service will be, whether to cremate, where the body or ashes will be interred and what type of headstone or urn to order.
- \_\_\_\_\_ **Will:** Probate is the legal process of executing a will. You'll need to do this at a parish probate court office. Probate court makes sure that the person's debts and liabilities are paid and that the remaining assets are transferred to the beneficiaries.
- \_\_\_\_\_ **Notify Family Members Employer:** Ask for information about benefits and any paychecks that may be due. Also inquire about whether there is a company-wide life insurance policy.
- \_\_\_\_\_ **Retirement Benefits:** Check with current and previous employer to see if retirement benefits are available.
- \_\_\_\_\_ **Contact the Social Security Office at 1 (800) 772-1213** – Apply for Social Security's Lump Sum Death Payment (LSDP). It is federally funded and managed by the U.S. Social Security Administration (SSA). A surviving spouse or child may receive a special lump-sum death payment of \$255 if they meet certain requirements. We can also assist you in completing form SSA-8.
- \_\_\_\_\_ **Life Insurance** – Locate ALL insurance policies. New Orleans Funeral and Cremation Service will be pleased to file any insurance claims on your behalf. A Certified Copy of Death Certificate for each insurance company (not each policy) will be needed.
- \_\_\_\_\_ **Veteran Benefits** – VA will pay up to \$796 toward burial and funeral expenses for deaths on or after October 1, 2019 (if hospitalized by VA at time of death), or \$300 toward burial and funeral expenses (if

not hospitalized by VA at time of death), and a \$796 plot-interment allowance (if not buried in a national cemetery). You may wish to check with the VA regarding Widow's Pension and other V.A. benefits. Information may be found at [www.va.gov](http://www.va.gov) or by calling 1-800-827-1000. Our representative will assist you in the completion of the forms if desired.

\_\_\_\_\_ **Veterans Flag and Marker:** New Orleans Cremation Service is happy to provide you with the necessary forms to assist in obtaining an American Flag and/or Headstone or Marker for the deceased veteran. You may wish to check with the VA regarding eligibility and other VA benefits. Information may be found at [www.va.gov](http://www.va.gov) or by calling 1-800-827-1000. Our representative will assist you in the completion of the forms if desired.

\_\_\_\_\_ **Notify Banks and Financial Institutions:** If you share a joint account with your deceased loved one, you'll need to notify the bank of their passing. Most bank accounts carry automatic rights of survivorship, which means if your name is on the account, you have full access to the funds when your loved one dies. You become the sole owner on the date of your relative's death. Most banks will require a death certificate to remove the relative from the account.

If the deceased person was the sole owner of a bank account, the bank will release funds to the person named beneficiary once it learns of the account holder's death.

\_\_\_\_\_ **Financial Advisors and Stockbrokers:** Determine the beneficiary listed on accounts. Depending on the type of asset, the beneficiary may get access to the account or benefit simply by filling out appropriate forms and providing a copy of the death certificate (no executor needed). While access to the funds are straightforward, there may be tax consequences to keep in mind.

\_\_\_\_\_ **Credit Agencies:** To prevent identity theft, send copies of the death certificate to one of the three major credit bureaus: Equifax, Experian or TransUnion. You only need to inform one of them, and the information will be shared with the others.

\_\_\_\_\_ **Credit Cards:** Close all credit card accounts and check to see if credit life was in place to cover balances due on credit cards, mortgages, etc.

\_\_\_\_\_ **Driver's License:** Contact the Division of Motor Vehicle to cancel the deceased Drivers License. This removes the deceased's name from the records of the department of motor vehicles and prevents identity theft. Contact the agency for specific instructions, but you'll need a copy of the death certificate. Keep a copy of the canceled driver's license for your records. You may need it to close or access accounts that belonged to the deceased.

\_\_\_\_\_ **Utilities Companies:** Notify all utility companies such as Electric and Gas.

\_\_\_\_\_ **Secure the property:** Secure the deceased's home and vehicle. Ask a friend or relative to water the plants, get the mail and throw out the food in the refrigerator. If there are valuables, such as jewelry or cash, in the home, secure them as well.

\_\_\_\_\_ **Pet Care:** Make sure pets have caretakers until there's a permanent plan for them. Send them to stay with a relative who likes animals or board them at a kennel. The pet will be grieving, so be sure they're with someone who can comfort them.

\_\_\_\_\_ **Mail:** Go to the post office and put in a forwarding order to send the mail to yourself or whoever is working with you on the immediate affairs of the deceased.

If you have any questions or can assist in any way, please be sure to contact our office at: **(504) 218-5554.**