

Things to do following the death of a loved one . . .

(Mark each item as you complete this list)

- 1. Order certified copies of the death certificates from the funeral home. Please let us know if you need additional copies by calling 330-343-5506. Our office will gladly assist you.
- 2. Send acknowledgment cards to . . .
 - a. Those who sent flowers or brought food.
 - b. Those who assisted as pall bearers.
 - c. Those who assisted as musicians, custodians, altar assistants, lunch providers, etc.
 - d. Clergy or others who may have participated in the service.
- 3. For any legal questions, contact an attorney. He/She will discuss with you probating of the will, inheritance and estate issues, etc. He/She will also help you draw up or update your own will.
- 4. Notify insurance companies and file claims when appropriate.
 - a. Life Insurance
 - b. Medical, Health, Disability, Travel, and Accident
 - c. Pension Benefits
 - d. Change Homeowners Insurance (you will become the named insured.)
 - e. Change Automobile Insurance
 - f. Change the beneficiary on your own life insurance policy if the prior beneficiary was the deceased.
- 5. Notify the deceased's employer or pension provider of death. Check on group insurance benefits, survivor's benefits, profit sharing, and/or pension monies that may be payable to the estate or to beneficiaries.
- 6. Transfer vehicle title into your name at the County Clerk of Courts office (125 East High Avenue, New Philadelphia, OH 44663 - 330-365-3243), or if estate is probated, Probate Court (101 East High Avenue, New Philadelphia, OH 44663 - 330-365-3266).
- 7. Notify stockbroker
 - a. Change ownership of joint or solely owned stocks.
 - b. Cancel any open orders arranged by deceased.
- 8. Notify bank
 - a. Change all jointly held accounts and amend tax identification numbers.
 - b. Cancel direct deposit retirement benefit payments.
 - c. Re-establish name on safe deposit box.
 - d. Re-establish mortgage, loans, notes, etc.
 - e. If you bank with a credit union, check to see if they supply a life insurance benefit.
- 9. Notify credit card companies. Some credit cards carry credit life insurance in the event of accidental death.
- 10. Speak with an Advance Planning Consultant from the Geib Funeral Homes regarding your advance funeral plans. (330-343-5506)
- 11. Cancel appointments made by the deceased.
- 12. Arrange for the return of any medical equipment to the medical supply carrier.

- 13.** Notify schools, colleges, professional organizations regarding the death.
- 14.** If the deceased was a member of a labor union, notify the union and inquire about any survivor benefits to which you may be entitled.
- 15.** Keep an up-to-date accounting of all cash income and expenses.
- 16.** Collect any debts owed to the deceased.
- 17.** Make a review of your own financial situation.
- 18.** Be cautious about those who contact you to sell you merchandise, such as grave markers, cemetery space, memorial Bibles, etc. If you are approached by someone in this regard, call us or the Better Business Bureau before buying.
- 19.** Contact the Social Security Administration (1260 Monroe St. NW, Suite 1C, New Philadelphia, OH 44663 -1-866-731-4236). The funeral home has made notification of death, but you will want an appointment to inquire about the possibility of additional death benefits.
- 20.** Contact the Veterans Service Office (393 16th St. SW, New Philadelphia, OH 44663 - 330-339-1163).