

Task Lists for Families



- 🍁 Making decisions about services
- 🍁 Gathering legal information
- 🍁 Assigning care team tasks
- 🍁 Notifying friends & family
- 🍁 Notifying the community
- 🍁 Creating ceremonies & receptions
- 🍁 Taking charge of the details

Task Lists for Families

Taking care of the details can be an overwhelming experience for families in grief. The list and suggestions in the following pages may be helpful in making and following through with common decisions.

Keep in mind:

- *There is no right way or wrong way to approach this experience.*
- *There is no need to try to do it all alone.*
- *Everyone shares in this experience to whatever degree they are able.*
- *Helping is a tool most people find useful in working through their own grief.*

The lists that follow are broken down into different types of information or care. Select or accept help from people who are best able and willing to perform the tasks in each area. Often the areas will overlap – try to remember that you are on the same team.

Above all, look to your loved one for clues as to what he or she may have wanted most. His or her last wishes are a legacy to you, as much as they are an expression of his or her unique views and desires.

...the amount you love is not equal to the amount you pay...

Initial Decisions Regarding Services

Who will coordinate and arrange services? _____

Who will pay for services? _____

_____ Are there any pre-planning documents (advanced directive for death care)?

_____ Are there any pre-need or pre-paid agreements with a funeral home or memorial society?

Service types

- **Memorial** service is when friends gather but the body is not present
 - **Funeral** service is when the body is present, whether open or closed casket
 - **Tribute** can be held at the time of death or much later, to honor their contributions
 - **Celebration of Life** may be held anywhere, anytime
 - **Committal** services are when the body or cremains are buried (also called final disposition)
 - **Scattering** is when the cremains are distributed above ground
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Body will be: buried _____ cremated _____ donated to science _____

Funeral service: none _____ church _____ hall _____ home _____ other _____

Memorial service: none _____ church _____ hall _____ home _____ other _____

Scattering: ashes kept by family _____ ashes scattered where _____

Viewing: none _____ lying in honor in the home _____ funeral home wake _____

Burial/Scattering: _____ church service and public burial

_____ church service and private burial

_____ church service with later burial

_____ cremation with later burial or scattering

_____ cremation with immediate burial or scattering

What is the estimated price range? _____

*(This may best be answered **after** the family has determined which services they are interested in doing for themselves, and which will require a funeral director. If using a funeral home for any part, they are required by law to quote accurate prices over the phone and by written itemized list when you visit.)*

Gathering Legal Information

Name of person in charge _____

For death certificate

- ___ Copy of the will
- ___ Advanced directives concerning after death care
- ___ Pre-planned agreements w/ funeral home/crematory
- ___ Title to burial plot
- ___ Birth certificate
- ___ Marriage certificate
- ___ Insurance policies
- ___ Bank records
- ___ Property deeds
- ___ Vehicle ownership records
- ___ Military discharge papers
- ___ Citizenship papers
- ___ Tax returns
- ___ Information for death certificate

Informing organizations and obtaining benefit information

You may wish to contact the following organizations as appropriate either before or after the service:

- ___ Attorney for transferring assets and probating the will
- ___ Accountant, tax preparer, to determine which returns need to be filed
- ___ Banks and credit unions, to locate accounts and safe deposit boxes
- ___ Insurance agents, to obtain claim forms
- ___ Social services, to learn about benefits
- ___ Social security, to stop any monthly checks and learn about benefits
- ___ Veteran's affairs, to stop monthly checks and learn about benefits
- ___ Creditors, to take care of outstanding balances
- ___ Utility companies, to change or discontinue service
- ___ Employer to notify of death and learn about benefits
- ___ Newspapers, magazines, to stop services
- ___ Postal service, to forward mail
- ___ Computer accounts, transfer or close internet accounts, on-line subscriptions
- ___ Guardian, conservator, and agent under durable attorney, to notify of death and the end of their responsibility

Information Worksheet for Death Certificate

Decedent Information

Legal name _____ Sex _____ SS# _____

Date of Birth _____ Age last birthday _____ + # months _____ days _____ hours _____ minutes _____

Birthplace _____ Father's name _____

Mother's maiden name _____

Spouse's name (prior to first marriage) _____

Address (street and number) _____ Town _____

County _____ State _____ Zip code _____

US Armed forces? Yes No Unknown

Marital status? Married Divorced Separated Never married Widowed Unknown

Education (indicate by highest level/degree) _____

Employment (work done most of life) _____

Type of industry or business _____

Name of employer/company name _____

Race (if Hispanic, specify) _____

Disposition

Date of disposition _____ Method of Disposition: Burial Donation Entombment Mausoleum

Cremation Ashes returned to family? Ashes to cemetery? Body or ashes out of state? Other _____

Place of disposition (name of cemetery, crematory) _____

Address (city/town/state) _____

Burial/Scattering

Place of final burial, entombment, ashes _____

Address or location _____

Filing Person's Information

Informant's name and mailing address _____

Relationship _____

Name and address of Next of Kin or Designated Agent _____

Care Team Tasks

Person leading care team _____

Transportation

Who will transport the body home if necessary?

_____ Funeral home name & phone _____

_____ Family or friend name & phone _____

Who will be transporting the body to the crematory or cemetery?

_____ Funeral home name & phone _____

_____ Family or friend name & phone _____

Who will pick up/receive remains? _____

If there will be a home viewing:

_____ Where will the body be lying-in-honor? _____

_____ Who will help move the body? _____

_____ Who will procure the: shroud pine box cardboard container? _____

_____ What clothing, jewelry, etc., will be selected? _____

_____ Who will be bathing and dressing the body?

1 _____

2 _____

3 _____

4 _____

5 _____

6 _____

If a funeral home will be preparing the body, who will provide the clothing and personal items required and when must they be delivered?

Notification of the Community

____ Employer _____ Phone _____

____ Clergy _____ Phone _____

Do you want to publish an obituary? Newspaper _____ On-line _____ TV _____

Who will write it? _____

Newspaper _____ Cost _____ With photo _____

Phone _____ email _____ Address _____

Newspaper _____ Cost _____ With photo _____

Phone _____ email _____ Address _____

Notify TV _____ Phone _____ email _____

Common information to consider for inclusion in obit:

____ Schools attended

____ Military record

____ Special awards and accomplishments

____ Children and family

____ Family history

____ Work or professional history

____ Religious affiliations

____ Civic groups

____ Hobbies

____ Charities or special interests

____ Indication of cause of death

Ceremony & Reception

Person overseeing _____

Who will be invited to the ceremony? _____

Are children invited? _____

Who will participate in the ceremony? _____

Will the body be viewed during the ceremony? _____

Who will lead the ceremony (family member, clergy)? _____

Will there be a public burial/scattering of ashes? _____ Where? _____

Who will help move/transport the body? _____

Speakers _____

Music _____

Program _____

Ushers and greeters _____

Pall bearers _____

Guest registrar _____

Memorial table _____

Checklist for Home Funeral

For body care

_____ Bowls for bathing

_____ Candles (optional)

_____ Clothes

_____ Make-up (optional)

_____ Scarves & shawls

_____ Soap and shampoo

_____ Table for supplies

_____ Towels and washcloths

_____ Sheets

_____ Blanket

_____ Pillow, pillowcase

For communication

_____ Camera

_____ Computer, printer

_____ Contact list

_____ Note cards

_____ Paper, pens

_____ Paperwork

_____ Phone numbers

_____ Photo albums

_____ Scissors

_____ Scrapbooks

_____ Stapler

For the memorial

service/memorial table

_____ Donations basket

_____ Flowers

_____ Objects of deceased

_____ Photographs, framed

_____ Photo albums

_____ Scrapbooks

_____ Guest book

_____ Memory book/box

_____ Letters

_____ Notes

_____ Cards

_____ Artwork

_____ Music, CD player

Home and Family Care

Gatekeeper

Person overseeing _____

You may need someone to help the person closest to the deceased handle situations, including prying questions or asking for possessions, etc. This person should stay particularly close during the reception.

Home coordinator(s) to:

Person overseeing _____

- Handle the details of daily maintenance during the initial period, including the viewing and/or reception
- Enlist help from others to or run errands to the bank, post office, grocery store, etc.
- Keeping the kitchen moving with the influx of guests – clean up dishes, sort through food, empty trash, etc. – and organize final clean up
- Keep list of food for thank you notes later; tape name on dishes to be returned
- Plan meals for the family before and after the service
- Organize help to address childcare, pet care, lawn care, house cleaning, small repairs
- Select someone to remain in the home during the ceremony and/or reception if elsewhere to answer calls or direct people to the right place

Telephone coordinator to:

Person overseeing _____

- Change answering machine outgoing message to thank callers and give ceremony info
- Taking and relaying messages

Be prepared to answer the following:

- Start time of the services, when and where
- Directions to get there
- What hotels/B&Bs are close by
- What to wear, what to bring
- How to get from the airport/bus station
- Details of the death (how, when, who was there, suffering, etc.)

How to answer tough questions regarding possessions: “Unfortunately, we can’t give anything away until after the will has been read.”

Obituary Checklist

Name/announcement

- Full name of the deceased, including nickname, if any
- Age at death
- Residence (for example, the name of the city) at death
- Day and date of death
- Place of death
- Cause of death, if choose to include

Life

- Date and place of birth
- Names of parents
- Childhood: siblings, stories, schools, friends
- Marriage(s): date of, place, name of spouse
- Education: school, college, university and other
- Designations, awards, and other recognition
- Employment: jobs, activities, stories, colleagues, satisfactions, promotions
- Military service
- Places of residence
- Hobbies, sports, interests, activities, and other enjoyment
- Community service, charitable, religious, fraternal, political, or other; positions held
- Achievements
- Unusual attributes, humor, other stories

Family

Survived by (and place of residence, in order):

- Spouse or partner
- Children (in order of date of birth, and their spouses if desired)
- Grandchildren, great-grandchildren, great-great-grandchildren
- Parents, then grandparents
- Siblings (in order of date of birth)
- Others, such as nephews, nieces, cousins, in-laws
- Friends

Predeceased by (and date of death):

- Spouse or partner
- Children (in order of date of birth), then grandchildren
- Siblings (in order of date of birth)
- Others, such as nephews, nieces, cousins, in-laws
- Pets (if appropriate)

Service

- Day, date, time, place
- Name of officiate or celebrant, pallbearers, honorary pallbearers
- Visitation information if applicable: day, date, time, place
- Reception information if applicable: day, date, time, place
- Other memorial, vigil, or graveside services if applicable: day, date, time, place
- Place of interment
- Name of funeral home in charge of arrangements if using one
- Where to call for more information (even if no service is planned)

Donations, Thank You, Quotations

- Memorial funds, memorial donation suggestions, including addresses
- Thank you to people, groups, or institutions
- Quotation or poem

