

After a Loss: A Practical Planning Checklist

A simple guide to help families organize the first steps following the death of a loved one.

Immediate Actions (First 24–48 Hours)

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| ☐ Contact the funeral home | ☐ Notify immediate family and close friends |
| ☐ Contact your minister or clergy | ☐ Notify the executor of the Will |
| ☐ Contact the deceased's employer | ☐ Notify agent under Power of Attorney |
| ☐ Arrange care for children, dependents, or pets | ☐ Secure the residence |
| ☐ Remove valuables | ☐ Dispose of perishable food |
| ☐ Forward the deceased's mail | ☐ Notify religious/fraternal/civic organizations |
| ☐ Contact your attorney regarding probate | |

Gather Important Documents

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| ☐ Will | ☐ Birth Certificate |
| ☐ Social Security Card | ☐ Marriage License |
| ☐ Military Discharge Papers (DD-214) | ☐ Burial Property Deed |
| ☐ Funeral Prearrangements | ☐ Life Insurance Policies |

Information Needed for the Death Certificate

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|---|---|
| ☐ Full Legal Name | ☐ Home Address |
| ☐ Social Security Number | ☐ Date of Birth |
| ☐ Date of Death | ☐ Age |
| ☐ Gender | ☐ Race/Ethnicity |
| ☐ Occupation | ☐ Highest Education |
| ☐ Place of Birth | ☐ Marital Status |
| ☐ Spouse's Name | ☐ Father's Name |
| ☐ Father's Birth City | ☐ Father's Birth State |
| ☐ Mother's Name | ☐ Mother's Birth City |
| ☐ Mother's Birth State | |

Veteran Information (If Applicable)

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|---|--|
| ☐ Branch of Service | ☐ Service Number |
| ☐ Rank/Grade | ☐ Date Entered Service |
| ☐ Place Entered Service | ☐ Date Separated from Service |
| ☐ Place Separated from Service | |

Helpful Resources

Department of Veterans Affairs
1-800-827-1000
www.vba.va.gov

Michigan Death Certificates
517-335-8656
VRCustomerService@michigan.gov

Ohio Death Certificates
614-466-2531
odh.ohio.gov

Questions About Legacy Giving?

Bowline Legacy Society
Scouting America Erie Shores Council
5600 W. Sylvania Ave.
Toledo, OH 43623

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