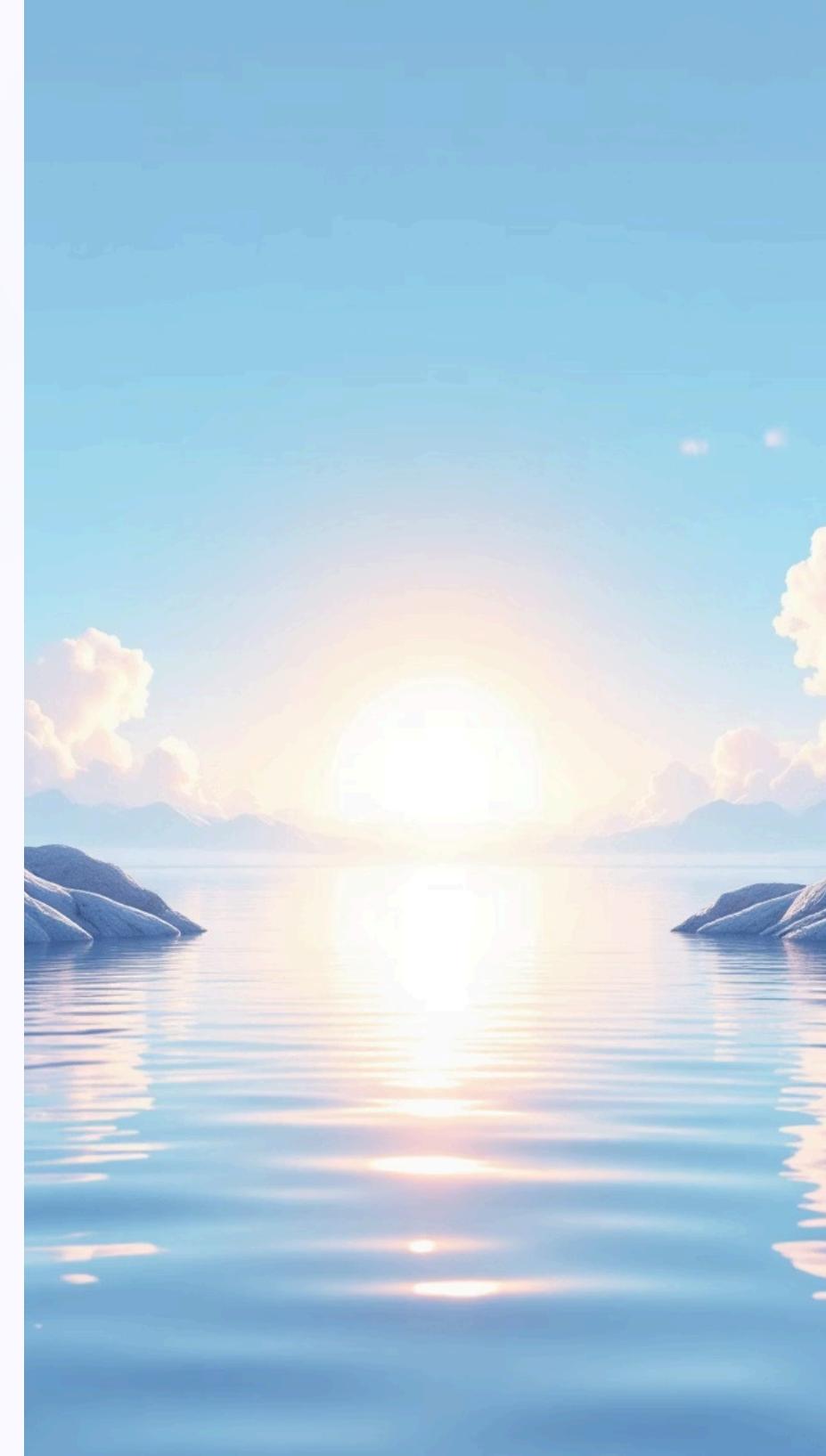




EVERLASTING
FUNERAL  ADVISORS

EFA After-Death Planner & Checklist

Clear, step-by-step guidance for loved ones after a death occurs.
Created with care by Everlasting Funeral Advisors.





How to Use This Checklist

For Loved Ones

This checklist is designed for executors, family members, and trusted contacts who need clear direction during a difficult time.

Follow in Order

The steps are organized by timeframe to help you prioritize what matters most right now.

Take Your Time

You don't need to complete everything at once. Move through these steps at a pace that feels manageable.

First 24-48 Hours

Immediate Actions



Locate the EFA app or binder

Find the digital app or physical binder where instructions and important information are stored.



Read "My Instructions"

Review the personal wishes and specific guidance left for you. This will direct your next steps.



Notify immediate family or contacts

Reach out to those on the notification list. Keep communications simple and clear.



Secure home, pets, and valuables

Ensure the residence is locked, pets are cared for, and important items are safe.



Contact funeral or cremation provider

If applicable, reach out to the selected provider using the information in the EFA materials.



First Week

Essential Tasks

Coordinate services or arrangements

Work with the funeral home or service provider to finalize memorial arrangements according to recorded wishes.

Order death certificates

Request at least 10 certified copies. You'll need these for banks, insurance, and government agencies.

Notify employer if applicable

Contact the deceased's workplace to discuss final pay, benefits, and any pending matters.

Begin insurance and benefits notifications

Start reaching out to life insurance companies, Social Security, and pension administrators.

First Month

Administrative Foundation



- **Notify financial institutions**

Contact banks and credit card companies with death certificates to freeze or transfer accounts.

- **Manage urgent bills and utilities**

Keep essential services active and address time-sensitive payments to prevent disruptions.

- **Forward mail**

Set up mail forwarding to ensure no important correspondence is missed.

- **Meet with executor or attorney**

If needed, schedule a meeting to review the estate, will, and legal responsibilities.

3-12 Months

Long-Term Resolution

O1

Close or transfer accounts

Systematically close credit cards, subscriptions, and other accounts. Transfer ownership where appropriate.

O2

Complete tax and administrative tasks

File final tax returns and address any outstanding government obligations or documentation.

O3

Distribute assets as required

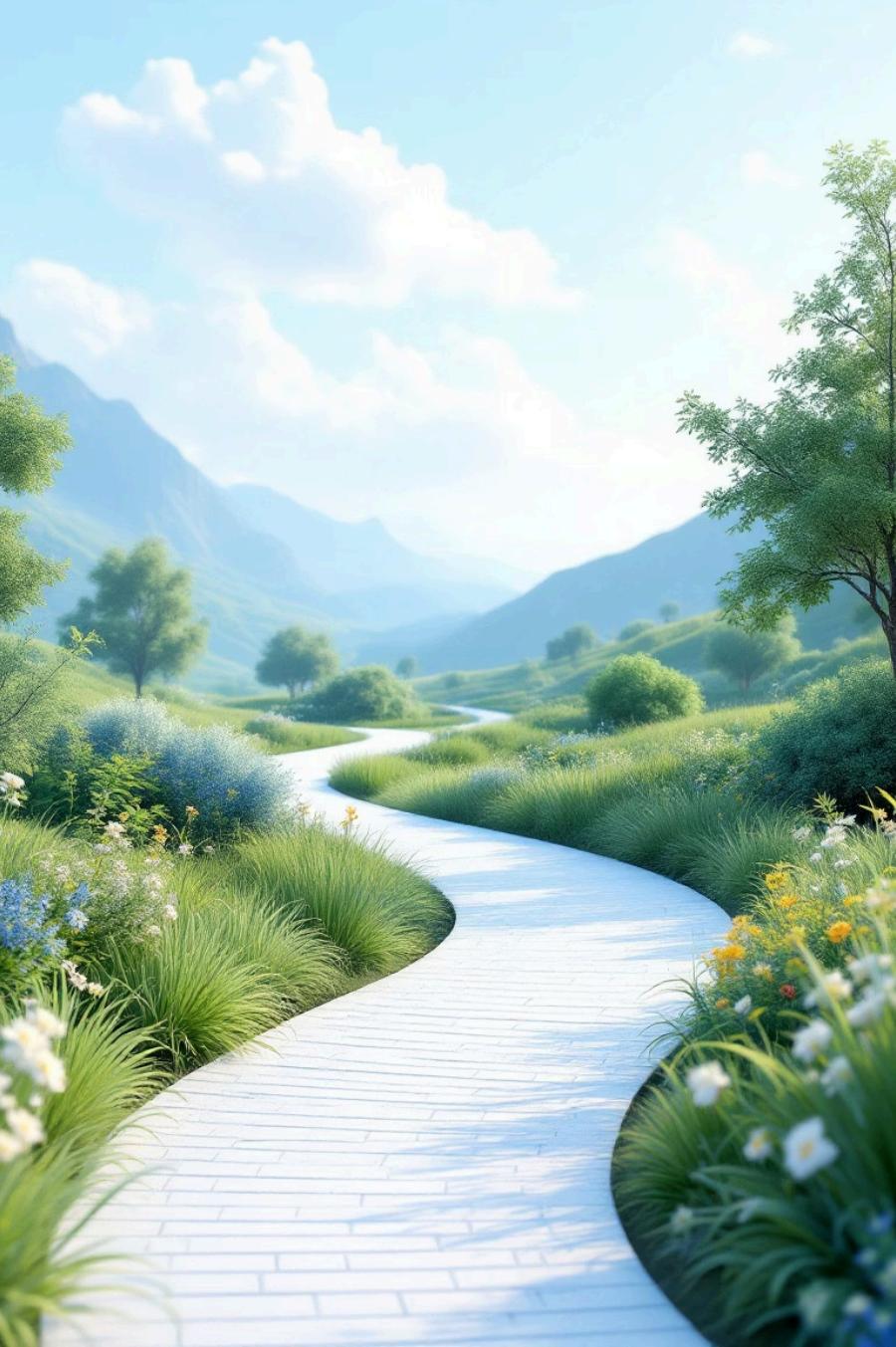
Follow the will or estate plan to distribute property, funds, and personal belongings to beneficiaries.

O4

Archive important documents

Organize and securely store all final paperwork, records, and certificates for future reference.





Understanding the Timeline

- 1** 24-48 Hours
Immediate actions and notifications
- 2** First Week
Essential arrangements and initial notifications
- 3** First Month
Administrative foundation and financial notifications
- 4** 3-12 Months
Long-term resolution and closure

Key Resources to Have Ready



Death Certificates

Order at least 10 certified copies early. Nearly every institution will require an original.



EFA Materials

Keep the app or binder accessible. It contains contact lists, account information, and personal wishes.



Contact List

Use the prepared list of family, friends, professionals, and service providers who need to be notified.

Remember: You're Not Alone

This process can feel overwhelming, especially during grief. The EFA checklist exists to reduce uncertainty and provide clear direction.

Lean on professionals when needed—attorneys, financial advisors, and funeral directors are there to help. Take breaks. Ask for support. Move through this at your own pace.

One Step at a Time

You don't need to do everything today. Each task completed is progress.





Take This One Step at a Time

This checklist exists to reduce guesswork and stress during an already difficult time. You're doing the right thing by following these steps with care and intention.

- Everlasting Funeral Advisors is here to support you through this journey with clarity, compassion, and practical guidance.

