

# After-Death Planner

Essential Steps for Loved Ones

**THIS PLAN IS PREPARED FOR:**

Date: \_\_\_\_\_

**Provided by:**

**Everlasting Funeral Advisors**

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## **IMMEDIATE NEEDS (First 48 Hours)**

### **Contact funeral home**

**Name:**

**Phone:**

### **Secure residence**

**Notes:**

### **Notify immediate family**

**Contacts:**

**Other urgent items:**

## **OFFICIAL NOTIFICATIONS**

### **Social Security Administration**

Contact:

Confirmation:

### **Employer or HR Contact**

Contact:

### **Insurance Company**

Company:

Policy:

### **Bank or Account Closing**

Status:

## **KEY DOCUMENTS AND LOCATIONS**

**Will or Trust Location:**

**Living Trust:**

**Deeds or Titles:**

**Insurance Policy Folder:**

**Tax Returns Found In:**

**Safe Deposit Box:**

## **DEATH CERTIFICATES**

**Number Ordered:**

**Recipients:**

- All certificates received**

## **OBITUARY AND ANNOUNCEMENTS**

**Obituary Text:**

**Publication(s):**

**Online Link:**

## **SERVICE AND MEMORIAL DETAILS**

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**Service Type:**

**Venue:**

**Address:**

**Date/Time:**

**Officiants:**

**Music or Readings:**

**Confirmed with funeral home**

## **FINANCES AND ESTATE TASKS**

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**Executor:**

**Contact:**

**Attorney:**

**Bank Accounts or Debts:**

**Property Transfers:**

**Estate accounts settled**

# **DIGITAL ACCOUNTS AND ACCESS**

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## **Account 1**

**Platform:**

**Username:**

**Status:**

**Completed**

**Notes:**

## **Account 2**

**Platform:**

**Username:**

**Status:**

**Completed**

**Notes:**

### **Account 3**

**Platform:**

**Username:**

**Status:**

**Completed**

**Notes:**

**All digital accounts handled**

# **REAL ESTATE & UTILITIES**

## **Property 1**

**Address:**

**Mortgage:**

**Tax Info:**

**Insurance:**

**Utilities & Services:**

**Water:**

**Completed**

**Electric:**

**Completed**

**Gas:**

**Completed**

**Phone:**

**Completed**

**Internet:**

**Completed**

**Cable:**

**Completed**

**Lawn:**

**Completed**

**Pool:**

**Completed**

**Pest:**

**Completed**

**Propane:**

**Completed**

**Other:**

**Completed**

**Disposition & Transfer:**

**Realtor Estimate:**

**Future Use:**

**Transfer Notes:**

**Property Completed**

**Additional Notes:**

## **NON-DIGITAL SUBSCRIPTIONS**

### **Subscription 1**

Type:

Provider:

Account Info:

Completed

Notes:

### **Subscription 2**

Type:

Provider:

Account Info:

Completed

**Notes:**

**Subscription 3**

**Type:**

**Provider:**

**Account Info:**

**Completed**

**Notes:**

## **OTHER PROPERTY & POSSESSIONS**

### **Property Item 1**

**Category:**

**Description:**

**Location/Storage:**

**Estimated Value:**

**Intended Disposition:**

**Notes:**

**Completed**

### **Property Item 2**

**Category:**

**Description:**

**Location/Storage:**

**Estimated Value:**

**Intended Disposition:**

**Notes:**

**Completed**

**General Notes:**

## **BUSINESS OWNERSHIP & MANAGEMENT**

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**Business Name:**

**Business Type:**

**EIN:**

**Ownership Structure:**

**Key Business Contacts:**

**Business Accountant:**

**Business Attorney:**

**Succession Plan:**

**Business Bank Accounts:**

**Business Assets:**

**Business Liabilities:**

**Disposition Instructions:**

**Business Tasks Checklist:**

- Partners/Co-owners notified
- Employees notified
- Accounts transferred or closed
- Licenses handled
- Disposition completed