

After-Death Planner

Essential Steps for Loved Ones

THIS PLAN IS PREPARED FOR:

Date: _____

Provided by:

Everlasting Funeral Advisors

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Website: <https://everlastingfuneraladvisors.com>

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

Service Type:

Venue:

Address:

Date/Time:

Officiants:

Music or Readings:

☐ **Confirmed with funeral home**

FINANCES AND ESTATE TASKS

Executor:

Contact:

Attorney:

Bank Accounts or Debts:

Property Transfers:

☐ **Estate accounts settled**

DIGITAL ACCOUNTS AND ACCESS

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

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