



# ***POST FUNERAL CHECKLIST***



The following is a list of those items which should be attended to following the funeral of your loved one.

**Certified Copies of the Death Certificate**

At the arrangement conference, Ocean View Funeral Home will help you to determine the number of Death Certificates you need. Additional copies can be obtained by contacting the Funeral Home. South Carolina Certified Copies of Death are \$12 for the first and \$3 for each additional; North Carolina Certified copies of death are \$10 each.

**Mail Thank You Cards**

You can obtain personalized thank you cards from the funeral home or purchase thank you cards on your own. It is acceptable to mail thank you cards at your convenience; however, they should be sent out within a few weeks of the death, if not sooner.

**Change all Utilities from the Deceased's Name**

It is a good idea to use only your first initial and last name when listing your name in the phone book. This will help avert any unwanted or prank calls. Many, if not all, of these accounts should be placed in a joint account with another family member to help in processing future estates.

**Contact all Health Insurance Companies**

You should notify the Health Insurance Company to stop coverage of the deceased as of the date of death.

**Contact Life Insurance Company**

The insurance company will require a Certified Copy of the Death Certificate, the Insurance Policy, and a claim form to be completed and signed by the beneficiary. The claim form will be provided by the insurance company after they are notified of the death. Should you need assistance completing the form, please feel free to call the Funeral Home for assistance. You will also want to change those policies which the deceased was named beneficiary. Generally the owner of the policy must contact the insurance company to request a change of beneficiary form. This form is then completed and returned to the company. They will then return a rider which is attached to the policy showing the changes made. If you have an insurance agent locally, it is best to contact them for assistance.

**Notify Banking Institutions**

It is recommended that each banking institution, that the deceased had account in, be notified of the death. A Certified Copy of the Death Certificate may be needed by each bank. On any outstanding loans, you will want to check to see if there was life insurance carried on them. If so, your banker will advise and assist you with the details. You will want to remove the deceased's name from all joint accounts (checking, savings, safety deposit box and any other that your banker recommends) and sign a new signature card for these accounts. This is for your protection, should someone try to gain access to these accounts they could not sign the deceased's name to them to remove any funds. It is also recommended that if these accounts were held jointly you may want to continue them to be joint accounts by placing the name of a family member or trusted friend on them with you. Again, this is for your protection. Should you become unable to access these accounts the other individual named could for you.

**Contact Automobile Insurance Companies**

You should notify the Automobile Insurance Agent of the change of coverage to any and all automobile policies under the deceased's name. Your agent will advise you of the proper change needed depending on the ownership changes to the automobiles.



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- Notify all Credit Card Companies**  
Cancel and Close all accounts and all cards held individually by the deceased. Cut these cards and either return them to the company or discard them. Remove the deceased's name from all jointly held cards. This is for your protection. Apply for credit card life insurance coverage held on the accounts of the deceased.
- Contact Attorney**  
Documents needed by the Attorney include the certified copies of the death certificates and the Will. Your attorney will advise you as to any other documentation needed.
- Notify Accountant / Financial Advisor / Tax Preparer**  
The above-named individual will advise you of any documentation needed. Refer to the "Final Tax Return" section.
- Notify Stockbroker**  
Your stockbroker will advise you of how many Certified Death Certificates you will need as well as any further documentation needed.
- Notify Fraternal Organizations of which the Deceased was a member.**  
A Certified Copy of the Death Certificate may be needed to apply for any benefits.
- Review Your Own Insurance Needs**  
Often, these needs change after the death of a family member or other loved one. Good organization of your own insurance information can aid survivors at the time this information is needed.
- Keep Extra Copies of Death Certificates to Send With Your Income Tax Returns**  
You may need to file a "final return" for the deceased or estate income tax returns if the estate itself generates any income.
- Call the Social Security Administration**  
Social Security benefits include a one time benefit of \$255.00 to the surviving spouse or dependent children. The national number is 1-888-577-6601. The Horry County Conway office is located at 1316 3<sup>rd</sup> Avenue, Conway, SC and their number is 1-888-577-6601. The Georgetown County Georgetown office is located at 413 King Street, Georgetown, SC and their phone number is 1-866-593-1584. Both of these offices are open 8:00am-4:00pm Monday, Tuesday, Thursday and Friday. They are open 8:00am-12:00pm on Wednesday and closed on Saturday and Sunday.
- Veteran's Administration**  
Claim forms can be completed at a Veteran's Administration Office, the funeral home or Veterans Service Commission. The funeral home can assist with obtaining a copy of a DD 214, US Flag or Veteran's marker. Other benefits will need to be applied for by the next of kin. The Veteran's Administration national number is 1-800-827-1000. The Horry County Conway Office is located at 2830 Oak Street, Conway, SC and their phone number is 1-843-915-5480. The Horry County office is open 8:00am-4:00pm Monday through Thursday, 8:00am-12:00pm on Friday and closed on Saturday and Sunday. The Georgetown County Georgetown Office is located at 537 Lafayette Circle, Georgetown, SC and their phone number is 1-843-545-3330. The Georgetown County office is open 8:30am-5:00pm Monday through Friday and closed on Saturday and Sunday.