



SERVANT SOLUTIONS DECEASED MEMBER CHECKLIST

When someone you love dies, the job of handling personal and legal details may fall to you. In some cases, it can be a stressful, bureaucratic task that can take a year or more to complete, all while you are grieving the loss of your loved one. Here are some basic items that will need to be done.

Get a legal certification of death

If your loved one died in a hospital or nursing home where a doctor was present, the staff will handle this. An official declaration of death is the first step to getting a death certificate, a critical piece of paperwork. But if your relative died at home, especially if it was unexpected, you'll need to get a medical professional to make a formal declaration of death. To do this, call 911 soon after they pass and have them transported to an emergency room where they can be declared deceased and moved to a funeral home. If your family member died at home under hospice care, a hospice nurse can make the declaration. Without a declaration of death, you can't plan a funeral, much less handle the deceased's legal affairs.

Get approximately 15 copies of the death certificate

You're going to need death certificates to close bank and brokerage accounts, file insurance claims and register the death with government agencies, among other things. The funeral home you're working with can get copies on your behalf, or you can order them from the vital statistics office in the state in which the person died.

Notify immediate family, ask them to contact others

Notify executor and lawyer

Notify minister or pastor to prepare ceremony

Ask someone to look after any pets

Ask someone to stay at the residence, if needed

Choose or contact funeral home and make arrangements

Notify Social Security 800-772-1213

Contact us if the loved one was a member of our Retirement Plan. If the deceased was an annuitant, the member can easily be overpaid, and we have to ask the family for reimbursement. You can reach us at info@servantsolutions.org or 765-642-3880.

Please contact us when a spouse passes away, since many times there is a death benefit payable. In all cases, we will need to get an updated beneficiary form and keep your record up-to-date.



We recognize that this list is far from comprehensive. We offer this information as a guide, and not all of it will apply in every case. We pray that you find peace in helping your family move through this process. It is truly an honorable opportunity and a testament to a close and trusted relationship.