

## TIME OF LOSS CHECKLIST

- ☐ **Call us at 888-204-3131, 24/7** to inform us of your loved one's passing. We will bring your loved one into our care and set up an appointment for you with one of our counselors.
  - ☐ **Items to bring to your appointment:**
    - Clothing and undergarments for your loved one (shoes are optional)
    - Recent color photograph of your loved one for identity confirmation
    - Copies of Healthcare Directive/Durable Power of Attorney for Health Care
  - ☐ **Establish who will have the honor of serving as casket bearers and make requests if traditional burial is selected.** (*typically 6 people*)
  - ☐ **Determine how many death certificates will be needed.** (*they are sent to investment fund managers, financial institutions with established accounts, life insurer and annuity companies, and other similar accounts*)
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### **Be prepared to provide loved one's personal information, including:**

- ☐ Social Security Number\*
- ☐ Date and state of birth\*
- ☐ Father's name and place of birth\* (*state/county*)
- ☐ Mother's full maiden name and place of birth\* (*state/county*)
- ☐ Military discharge papers (*DD-214*)
- ☐ Name of family clergy and place of worship (*please include address & phone number*)
- ☐ Healthcare directive (*if applicable*)

*\*Please note that these items are required by the State of California to complete the Death Certificate.*

Most of this information can be provided to the funeral home ahead of time through advance planning. In addition to purchasing property ahead of time, funeral/cremation services can also be arranged and paid for in advance.