AFTER A DEATH

Checklist & Family Guide

By Kirby Ingles

A companion for your family's toughest moments

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PURPOSE:

When someone dies, the people left behind are exhausted, grieving, and scattered. This guide gives them a clear, compassionate checklist—what to do, who to call, what documents to grab— so nothing critical gets missed. It also points quietly to the peace that comes when funding is already in place.

WHAT THIS IS (AND ISN'T)

• This is a step-by-step action map after a death.
• It is not the VFW Burial Guide or Will Kit. Those cover pre-death details. This starts the minute death happens and carries the family through the first 90 days.
• Use it as a printable PDF, a fillable form, and tear-out mini cards for the front of the "Legacy Binder."

HOW TO USE IT

1. Print and keep the full guide in your Legacy Binder.
2. Tape the 72-Hour Card on the inside cover.
3. When death occurs, hand the guide to a calm, trusted person (pastor, adult child, close friend) to quarterback.
4. Check the boxes as you go. Write notes in the margins.
5. Lean on Scripture, prayer, and community. You're not alone.

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0–24 HOUR CRITICAL ACTIONS

1. Contact a medical professional or hospice nurse to officially pronounce death (if not in a hospital).

2. Call 911 if death was unexpected/accidental; follow instructions.

3. Notify immediate family (one person calls, others cascade).

   Name:

   Telephone:

4. Secure children, elderly dependents, and pets.

5. Locate and secure all medications, firearms, valuables.

6. Contact the funeral home you plan to use.

   Name:

   Telephone Number:

7. Call Kirby / AO Globe Life issuing partner to initiate claim: (913) 675-9062

8. Retrieve or locate DD214 (if military honors desired).

   Location:

9. Contact pastor/elder/spiritual support.

   Name:

   Telephone:

Faith Prompt: "Blessed are those who mourn, for they shall be comforted." (Matt 5:4)

24–72 HOUR TASKS

1. Order multiple certified death certificates (10–15 copies recommended).

2. Meet with funeral director to finalize arrangements, invoice, and schedule.

   Name:

   Viewing or Memorial services date and time:

   Graveside Services date and time:

3. Provide policy number(s) to funeral home and funeral & final expense certificate and call Kirby for direct assignment/payment.

4. Notify employer(s) and survivors (benefits, last paycheck, COBRA).

   Name:

   Telephone:

5. Inform key friends, church, delegate support tasks.

   Name/Phone:

   Name/Phone:

   Name/Phone:

   Name/Phone:

6. Secure the home: lock doors/windows, pick up mail, care for pets.

7. Locate the will, trust, POA, and healthcare directives.

   Location:

8. Ensure someone stays with surviving spouse for 24–48 hours.

Faith Prompt: Read 2 Corinthians 1:3–4 and thank God for comfort you can extend to others.

DAYS 3–7 CHECKLIST

1. Meet with attorney for probate/trust administration.

   Name:

   Telephone:

2. Contact Social Security to report death (1-800-772-1213).

   SSN #:

3. Contact VA for burial allowances/survivor benefits.

   VA Telephone:

4. File life insurance/final expense claims (Kirby/AO Globe Life).

   Policy #:

5. Notify banks/credit unions; review joint account access.

   Financial Institution:

   Telephone:

   Account #:

6. Cancel or transfer utilities, phone, internet.

   Gas:
   Power:
   Water & Sewer:
   Phone:
   Internet:

7. Cancel recurring subscriptions (streaming, memberships).

   Subscriptions:
   Streaming Services:
   Memberships:

8. Gather bills due in the next 30 days.
   a.
   b.
   c.
   d.
   e.

9. Write obituary or delegate it; confirm with funeral home. (See next page)

Faith Prompt: Psalm 46: "Be still, and know that I am God."

Obituary Writing Worksheet

1. Full Name of Loved One:

2. Date of Birth & Date of Passing:

3. Family Survivors (parents, spouse, children, siblings, grandchildren):

4. Predeceased By (parents, spouse, siblings, children):

5. Key Biographical Highlights (service, achievements):

6. Legacy & Personal Values (what they taught you):

7. Funeral Service Details (date, time, location):

8. Special Requests or In Lieu of Flowers:

9. Personal Message or Scripture (optional):

WEEKS 2–4 CHECKLIST

1. Open estate bank account for bills and funds.

   Bank:

   Account:

2. Forward mail to executor/trustee.

   Name:
   Address:
   City:
   State:
   Zip:

3. Meet with CPA/financial advisor on taxes and retirement accounts.

   Name:
   Business:
   Address:
   Phone:

4. Transfer titles on vehicles and property.

   Vehicle 1:
   Vehicle 2:

   Property Address 1:

   Property Address 2:

5. Close or memorialize social media accounts.

   Facebook User Name & Password:
   Instagram User Name & Password:
   TikTok User Name & Password:
   LinkedIn User Name & Password:
   Other:

6. Update your own estate documents as needed.

   Attorney:
   Telephone:

7. Send thank-you notes to supporters.

Faith Prompt: Psalm 23: "The Lord is my shepherd; I shall not want."

30–90 DAY FOLLOW-THROUGH

1. Complete probate/trust filings; track deadlines.

   Attorney Name & Telephone:

   Executor of Estate Name and Telephone:

   Deadline 1:
   Deadline 2:
   Deadline 3:

2. Reassess household budget and insurance needs.

   Financial Advisor Name & Phone:

   Insurance Agent Name & Phone:

3. Review beneficiary designations on accounts.

   Review Power of Attorney, Will, Trust, Medical authorizations, update as necessary.

4. Schedule “legacy debrief” with family.

   Date/Time:

   Location:

5. Consider grief counseling or support groups.

   Counselor Name & Telephone:

   Support Group Name:

   Location:

   Date & Time:

6. Document lessons learned for next generation.

   a.

   b.

   c.

   d.

   e.

Faith Prompt: Psalm 78:4–7 – Tell the next generation what God has done.

DOCUMENTS & INFO YOU NEED

• Certified death certificates (10–15 copies)

• Social Security number

Husband: __ __ __ - __ __ - __ __ __ __
Spouse: __ __ __ - __ __ - __ __ __ __

• DD214 (if veteran)

Location:

• Marriage/divorce certificates

Location:

• Will, trust, POA documents

Location:

• Life insurance & final expense policies

Company:	Policy #	Point of Contact Name & Phone:
Company:	Policy #	Point of Contact Name & Phone:
Company:	Policy #	Point of Contact Name & Phone:

• Bank/investment account statements

Bank 1 Name:	Account #	Telephone #:
Bank 2 Name:	Account #	Telephone #:
Bank 3 Name:	Account #	Telephone #:

• Mortgage, loan, credit card info

Mortgage Company:	Property Location:	Telephone:
Loan Company:	Personal/Automobile/Other	Telephone:
Credit Card 1:	VISA/Master Card/Amercian Express	Telephone:
Credit Card2 :	VISA/Master Card/Amercian Express	Telephone:

• Titles (vehicle, home)
Vehicle 1:
Vehicle 2:
Residence:

• Utility account numbers:
Gas:
Power:
Water/Sewer:
Trash:
• Master password vault access:

Employer/pension info:

Name: Phone #:

AGENCIES, COMPANIES & ACCOUNTS

Government & Benefits:

- Social Security Admin
- Department of Veterans Affairs
- DFAS (military retired pay)
- State DMV
- IRS Financial/Insurance:
- AO Globe Life / Kirby
- Other life insurers
- Banks/credit unions
- Mortgage/loan companies Employment/Income:
- Employer HR/benefits
- Union/association
- Pension administrators Subscriptions & Tech:
- Cell phone
- Internet/streaming
- Social media
- Email accounts

HOME, PETS & SECURITY

1. Change locks if necessary.

2. Secure valuables or store them.

3. Arrange pet care (food, meds, boarding).

4. Pause deliveries/packages.

5. Inform neighbor/relative to watch the home.

MONEY FLOW & CLAIMS

- Final expense policies pay funeral director first, then leftover.
- Traditional life insurance sends a lump sum to beneficiary.
- Without coverage, families use credit or borrow.
- Keep receipts for potential deductions.

FAITH & SELF-CARE PROMPTS

Scriptures for Comfort:

• Psalm 34:18

• Isaiah 41:10

• John 14:1–3

• 2 Corinthians 1:3–4

Self-Care:

• Drink water and eat protein.

• Sleep or nap as needed.

• Walk outside for 10 minutes.

• Ask a friend/pastor to pray with you.

• Journal one memory of your loved one.

Prayer:

“Father, hold us while we hurt. Give us clarity and humility to ask for help. Thank You for (name). Comfort us. Amen.”

QUICK SCRIPTS & TEMPLATES

Funeral Home Phone Script:

“Hi, my [relation_____], (name_____), passed away on (date_____). We plan to use your services with direct payment from my final expense policy. What do you need to start?”

Insurance Claim Call:

“This is (name_____). Policy # (_____). (Deceased_____) passed on (date_____). I have the death certificate and invoice. Next steps?”

Obituary Post Template:

“(Name_____) went home to be with the Lord on (date_____). Service details to follow. In lieu of flowers: (instructions_____).”

TEAR-OUT CARDS

72-Hour Card:

1. Call Kirby (AO Globe Life): (913) 675-9062

2. Call funeral home: _____ Phone:_____

3. Get 10–15 death certificates

4. Find DD214 & will/trust. Location:_____

5. Don’t swipe credit cards for funeral expenses. Funeral and Final Expense Insurance policy covers it

Contact Matrix Card:

Insurance Agent:	Telephone:
Attorney:	Telephone:
Pastor:	Telephone:
Executor:	Telephone:
CPA:	Telephone:
Funeral Home:	Telephone:

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