



FINAL WISHES

Family Next Steps Checklist

A gentle guide for the days ahead

Take this one step at a time. Not everything needs to be decided today.

1. Immediate next steps

Focus first on what may be time-sensitive.

- ☐ Notify close family members and anyone who should be present for early decisions.
- ☐ Contact the chosen funeral home or cremation provider. If the family has not selected one, compare services and written prices before deciding.
- ☐ Confirm who will serve as the main family contact for providers and relatives.
- ☐ Secure the home, valuables, pets, medications, and other immediate personal matters.

2. Gather helpful information

The funeral home will explain exactly what it needs.

- ☐ Legal name, date and place of birth, Social Security number, and current address.
- ☐ Parents' legal names, including mother's maiden name, if available.
- ☐ Military discharge documents, cemetery deeds, prepaid plans, or insurance information.
- ☐ A recent photograph and clothing, if requested by the funeral home.

3. Plan the service or gathering

Choose only what feels meaningful and manageable.

- ☐ Decide between burial, cremation, or another form of disposition based on known wishes.
- ☐ Discuss the type of service: private, traditional, memorial, celebration of life, or no formal service.
- ☐ Choose a possible date, location, officiant, speakers, music, readings, flowers, and photographs.
- ☐ Set a comfortable budget before approving services or signing agreements.
- ☐ Ask for itemized written estimates and understand payment requirements before committing.

4. When you are ready

These items can usually be handled after immediate plans.

- ☐ Order the number of certified death certificates recommended for the family's needs.
- ☐ Notify the employer, insurance companies, financial institutions, government agencies, and other accounts as appropriate.
- ☐ Ask the hospice bereavement team about grief support and follow-up resources.
- ☐ Keep contracts, receipts, contact names, and important documents together in one safe place.

Important contacts

Funeral home / provider _____

Hospice bereavement team _____

Main family contact _____

Notes and reminders

You do not have to navigate every decision alone.

If your needs change, Final Wishes Concierge can help compare options, coordinate providers, organize timelines, and guide your family one decision at a time.

We're here when you need us.