Mt. Scott Funeral Home
"Family Owned and Operated"

4205 SE 59th Ave | Portland, OR 97206 | (503) 771-1171 | www.mtscottfuneralhome.com

Immediately following death, many activities must take place.
To help you through the process, we have prepared a simple checklist.

- ❑ Send notes to acknowledge expressions of sympathy
- ❑ Obtain certified copies of death certificate
- ❑ Make copies of dated obituary notice
- ❑ Check contents of safe deposit box
- ❑ Notify bank/financial institutions
- ❑ Locate marriage certificate
- ❑ Locate birth certificate
- ❑ File for Social Security benefits
- ❑ File for Veteran's benefits
- ❑ Order cemetery memorial (e.g., marker, monument, niche plate, etc.)
- ❑ Compile a list of heirs, next-of-kin, and beneficiaries
- ❑ File for life insurance benefits, including credit life
- ❑ Review life insurance policy beneficiaries and make necessary changes
- ❑ File for fraternal, union, and association benefits
- ❑ File for employer/retirement benefits (e.g., IRA, 401ks, pension, etc.)
- ❑ Contact attorney to discuss possible estate filing
- ❑ Review your will or living trust
- ❑ Review/complete healthcare advance directives (e.g., living will, durable power of attorney, etc.)
- ❑ Pre-arranged funeral planning
- ❑ Review transfer of car title(s) into your name
- ❑ Review automobile insurance policy
- ❑ Contact creditors (list below)

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- ❑ Secure health insurance
- ❑ Contact healthcare providers to update records (list below)

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- ❑ Additional family needs (list below)

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