

# CHECKLISTS

## Before, During & After

*Organized by role so the right person handles the right task*

You do not need to complete everything at once.

This is a working list. Return to it as needed.

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## BEFORE THE LOSS

*While there is still time to be present and prepare*

### CAREGIVER (Presence & Support)

- Confirm care plan with medical team or hospice
  - Create a simple daily rhythm (meals, rest, visitors)
  - Identify 1–2 people to provide relief coverage
  - Communicate updates to family regularly
  - Keep the environment calm and comfortable
  - Encourage meaningful visits (short and simple is enough)
  - Note changes in condition and communicate them
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### ADMINISTRATOR (Legal, Financial, Practical)

- Confirm who has legal decision-making authority
- Locate will, trust, insurance, and key documents
- Identify attorney, financial advisor, and key contacts
- Confirm beneficiary designations
- Verify veteran status and benefits (if applicable)

- Review bank accounts, passwords, and access points
  - Assess available funds for upcoming expenses
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## **FAREWELL PLANNER (Meaning & Experience)**

- Ask about burial or cremation preference
  - Ask about wishes for a farewell gathering
  - Write down one word that describes the person
  - List 3 defining qualities
  - Identify what they loved most
  - Capture at least one meaningful story in their own words
  - Begin collecting photos from different life stages
  - Identify people who should be invited to the farewell
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## **SHARED (Family Alignment)**

- Decide who will take each role
  - Identify who should visit soon
  - Ask: "Is there anything unfinished we should address?"
  - Reduce unnecessary obligations and distractions
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## **DURING THE LOSS**

*The first hours and days*

### **IMMEDIATE (First Hours)**

- Contact hospice nurse or medical professional
- Obtain legal pronouncement of death (if needed)
- Contact funeral home or cremation provider

- Notify immediate family
  - Pause before making announcements
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## **CAREGIVER / FAMILY**

- Gather those who should be present
  - Keep the space quiet and calm
  - Say what needs to be said
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## **ADMINISTRATOR**

- Confirm transfer of the body with provider
  - Secure personal belongings and residence
  - Begin list of people and organizations to notify
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## **FAREWELL PLANNER**

- Confirm general direction (burial or cremation)
  - Begin thinking about type of gathering (formal, informal, both)
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## **COMMUNICATION (Next 48 Hours)**

- Identify who will make calls vs send messages
  - Prepare a simple announcement
  - Notify close circle first
  - Hold off on public details until plans are confirmed
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## **AFTER THE LOSS**

## **FAREWELL PLANNER (Primary Lead)**

### **Discovering the Person**

- Complete the “One Word”
- Identify 3 core qualities
- List what they loved
- Write 1 Hero Story
- Write 1 Guide Story
- Draft the Essence Statement

### **Gathering Stories**

- Send request for stories to 5–10 people
- Collect and review responses
- Identify common themes
- Select 2–3 stories for sharing

### **Planning the Event**

- Choose location(s)
  - Decide on structure (Story Circle, Ceremony, Reception)
  - Select speakers or storytellers
  - Choose music that reflects the person
  - Plan one symbolic act tied to who they were
  - Confirm date and time
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## **ADMINISTRATOR (After Death Tasks)**

- Order certified death certificates
- Notify Social Security
- Contact banks and financial institutions

- Begin insurance claims
  - Cancel subscriptions and memberships
  - Secure or memorialize social media accounts
  - Meet with attorney or advisor if needed
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## **CAREGIVER / FAMILY (Support & Continuity)**

- Stay connected with close family members
  - Plan support for key dates (holidays, birthdays)
  - Schedule time to rest after the gathering
  - Revisit stories and memories together
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## **DAY OF THE FAREWELL**

- Open with the Essence Statement
  - Create space for stories
  - Keep the pace unhurried
  - Allow moments of quiet
  - Make room for informal conversation
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## **AFTER THE FAREWELL**

- Divide remaining responsibilities
  - Follow up on unfinished administrative tasks
  - Thank those who contributed
  - Consider a simple gathering at the one-year mark
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