

**Getting Your Affairs
in Order**

Beside you
when it matters most



Notes

Disclaimer: The purpose of this booklet is to act as a guideline to prompt conversation and action to assist families with getting their affairs in order at the end of life. The information in this booklet is provided as a courtesy reference tool by Chautauqua Hospice and Palliative Care. This booklet should not substitute for legal guidance and CHPC recommends you retain the services of an attorney. Time frames in this booklet are only suggestions and not to dictate action.

The mission of Chautauqua Hospice & Palliative Care is to provide comprehensive palliative/end-of-life care and education.

Current Considerations

Advance Planning

Complete or Update:

- Health Care Proxy
- Power of Attorney (POA)
- MOLST / eMOLST
- Do Not Resuscitate Order (DNR) if applicable
- Living Will
- Last Will and Testament
- Executor or Executrix of Estate
- Beneficiaries on wills, on insurance policies, pensions, stocks, bonds, investments, IRA's, 401K's, credit union/bank accounts

Financial Considerations

Review or Update:

- Current and future income
- Veteran status
- Life and other insurance policies
- Lines of credit and loans
- Real estate title
- Burial fund

Final Arrangements

Complete or Review:

- Funeral arrangements, life celebration, post-funeral gathering
- Obituary - Funeral home can assist
- Organ donation (UNYTS)
- University at Buffalo Anatomical Donation
- Funeral Options - Burial or cremation
- Memorials and donations in honor of loved one

Other Considerations

Review or Update:

- Gun permits
- Care of dependents
- Care of pets
- Vehicle registrations for automobile, boat, trailer, ATVs, etc.

Important Documents, Accounts and Passcodes

Locate and secure:

- Will
- Birth certificate
- Social Security Card
- Marriage license
- Divorce papers
- Insurance cards
- Medicare card
- Medicaid card
- Military discharge papers (DD-214)
- Deed to burial property
- Funeral arrangement paperwork
- Real estate deed(s) and title(s)
- Vehicle registration and title(s)
- Insurance policies
- Bank and credit union accounts
- Stocks, investments, bonds, etc.
- Gun and pistol permit
- Codes and passwords for voicemail, safes, online, building entry, etc.
- Keys for home, auto, safe deposit box, etc.

Immediately After Death

Important Steps

- Call Hospice - Hospice team will contact the funeral home, corner or University of Buffalo for anatomical donation
- Call family and friends - Secure the home if no one is staying there. Consult with attorney before removing personal effects or valuables

Anatomical Donation

If the services of a funeral home are not required because organs are to be donated, the following steps should be taken:

- Contact UNYTS
- Write the obituary and submit to newspapers where deceased was permanent and/or seasonal resident
- Obtain copies of the death certificate at the town hall in which the death occurred

One to Three Days After Death

Arrange for or complete:

- Funeral or memorial service - Gather pictures, clothing, dentures, glasses, etc.
- Obituary - Funeral Home will assist
- Return of medical equipment - Hospice will assist
- Dispose of perishables in residence
- Obtain copies of death certificate from the funeral home
- Cancel prescriptions

Within Two Weeks After Death

Legal Considerations

Notify or Contact:

- Power of attorney, if applicable
- Attorney - Will notify executor or executrix of the will, create a list of bills, and establish the bank account for the estate, etc.
- Post Office - to forward deceased mail

Financial Considerations

Notify or Contact:

- Social Security Administration - Funeral homes may or may not do this
- Accountant or tax preparer for estate tax return or final income tax filing
- Investment advisor - Collect information on holdings
- Banks, credit unions & financial institutions - Listing of accounts, safe deposit boxes, credit cards, loans, credit insurance, etc.
- Insurance agents for home, car, etc.
- Religious, fraternal, and civic organizations - Inquire about group life insurance benefits, if any
- Current or past employer - Finalize life insurance, pension, retirement savings, etc.
- Veterans Administration - Inquire about military benefits
- Utility Companies - Change address or account name
- Credit reporting agencies

Other Considerations

Notify or Contact:

- Medicare - Funeral homes may or may not do this
- Medicaid, if applicable
- Email, social media and internet accounts
- Update or cancel utilities and services - Electricity, gas, water, cable, newspaper, etc.
- Send acknowledgement cards for flowers, donations, food, kindness, pallbearers, etc.

Within a Month or More After Death

Legal Considerations

Notify or Contact:

- Board of Elections - cancel voter registration
- DMV - Cancel driver's license
- Attorney or DMV - Transfer titles of vehicles, RVs, boats, etc.

Other Considerations

- Organize deceased's personal belongings and distribute with the help of attorney
- Remove deceased from marketing lists, mailing lists, magazine and newspaper with the help of attorney

Notes

716-338-0033 (South County)

716-753-5383 (Mayville area)

716-672-6944 (North County)

All numbers ring at our
Lakewood offices

Learn more at www.chpc.care.

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