



MCA FUNERAL HOME

Muslim Community Association

1755 Catherine Street, Santa Clara, CA 95050

funeral@mcabayarea.org | Phone (408) 727-7277 | (408) 839-9313 | Fax (408) 970-9561

License # FD2206

<http://www.mcabayarea.org/about-us/funeral-services>

CHECK LIST OF THINGS TO BE DONE AT TIME OF DEATH

- _____ **Check to see if decedent left funeral and burial instructions.**
- _____ **Check to see if decedent wanted to make an anatomical gift.**
- _____ **Call cemetery and burial arrangements**
- _____ **Make a list if immediate family, friends, and employer. Notify by phone.**
- _____ **If deceased lived alone:**
 - a) **Make sure residence is closed and secure and notify landlord.**
 - b) **Remove valuables and important documents to a safe place.**
 - c) **Contact utility companies to discontinue service**
 - d) **Arrange for forwarding of mail.**
- _____ **Collect information for the obituary. Include age and place of birth, cause of death, occupation, college degrees, military service, survivors names, and the date, time, and location of funeral service. If you publish the date and time of the funeral service, make sure someone is at the family residence during the service because burglars often read obituaries.**
- _____ **Prepare a list of persons to be notified by letter or printed notice.**
- _____ **Contact the attorney who prepared the Living Trust or Will and obtain instructions.**
- _____ **Obtain certified copies of the death certificate from the mortuary.**
- _____ **Assemble important papers, such as Living Trust, bank books, stock certificates, real estate deeds, insurance policies, etc.**
- _____ **Each insurance company should be provided with a Statement of Claim and Death Certificate.**
- _____ **Contact the nearest Social Security Office for benefits. Benefits vary according to number of and ages of surviving children, and the age of the surviving spouse.**
- _____ **If the deceased was a veteran, an application should be made for Veterans Administration Benefits.**



MCA FUNERAL HOME

Muslim Community Association

1755 Catherine Street, Santa Clara, CA 95050

funeral@mcabayarea.org | Phone (408) 727-7277 | (408) 839-9313 | Fax (408) 970-9561

License # FD2206

<http://www.mcabayarea.org/about-us/funeral-services>

_____ **Contact the deceased's employer and, if applicable, union or professional group.**

_____ **If credit cards were in joint names, remove the deceased's name from the credit cards. If credit cards were in the deceased's name alone, cancel the credit cards.**

_____ **Current installment loans, service contracts and credit card bills should be gathered together, since some may be covered by credit life insurance, which pays off all or part of the outstanding balance on the death of a customer. Similarly, there should be a check to see if the deceased had mortgage insurance policy, which repays the outstanding mortgage upon the death of the policyholder.**

_____ **Locate evidence of indebtedness due by the estate by careful search. Examine all check books, tax returns and other financial records for this purpose.**

_____ **Notify automobile insurance companies for immediate cancellation and refund of unused portion of policy.**

_____ **Change any casualty insurance policies to eliminate the deceased's name as beneficiary.**

_____ **Make a list of any claims against the estate. Contact attorney if any of the claims are disputed.**

_____ **Contact the Department of Motor Vehicles and banks to terminate joint tenancies.**

_____ **Change title deceased's assets to co-trustee, successor trustee or successor Beneficiary as applicable. An attorney should be used to transfer title to real estate, but most other transfers can be done without the B trusts.**

_____ **Contact your accountant. If you have an A-B trust, assets have to be allocated to the appropriate trust and tax I.D. # will have to be obtained for the B trusts.**

_____ **State and Federal income tax returns still have to be files and taxes paid. Income taxes are not excused by death. A surviving spouse may still file a joint return for the year of death of the deceased spouse.**