First 48 Hours Family Action Worksheet

Practical information to gather after a death in the United States

Start with what is known. Leave blank what is not yet known. Move one step at a time.

IMPORTANT NOTICE

This free worksheet is provided for informational and educational purposes only. It does not constitute legal, tax, financial, medical, psychological, funeral, insurance, estate, or other professional advice. Requirements may vary by state, county, agency, provider, and individual circumstances.

CALM START

The first goal is not to do everything. The first goal is to create order. Write things down, keep important items together, and avoid rushed decisions whenever possible.

1. Essential Information

Full legal name of the person who died

Date of death

Time of death, if known

Place of death

Main family contact / decision-maker

Relationship

Phone

Email

Immediate notes, facts to confirm, or information still missing

2. First People to Contact

Use this page to keep the first calls organized. Mark a box when the person or organization has been contacted, and write the next step before moving on.

Name / Organization	Role / Relationship	Phone / Email	Contacted	Next Step
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	
			☐	

Helpful first contacts to consider

Close family or legally responsible person; funeral home or crematory; hospice, hospital, doctor, or local authority; attorney or estate contact; clergy, celebrant, or trusted support person; employer or benefits contact, if urgent.

3. Documents and Items to Locate

Gather first, then decide what needs action. Do not discard documents too early, and do not store full Social Security numbers or passwords in this unsecured worksheet.

Done	Item to locate	Location / Notes
☐	Photo ID or other identifying information	
☐	Date, time, and place of death	
☐	Death certificate information or ordering details	
☐	Will, trust, or estate papers	
☐	Funeral, cremation, cemetery, or prepaid documents	
☐	Insurance policies or recent insurance mail	
☐	Recent bills, bank mail, or account statements	
☐	Phone, wallet, keys, purse, and essential personal items	
☐	Property, vehicle, lease, or mortgage documents	
☐	Military discharge papers, if applicable	
☐	Names of attorney, advisor, doctor, or funeral director	
☐	Digital access instructions, only if lawfully available	

Pause before canceling accounts

In many situations, it is safer to gather information first and seek guidance before closing, canceling, transferring, or dividing anything. Keep a written log of calls, names, dates, and instructions.

4. First Calls and Practical Tasks

This is a working list. Some items may not apply. Add notes, names, confirmation numbers, prices quoted, or documents requested.

Done	Call / Task	Who / Phone	Notes / Next Step
☐	Funeral home, crematory, or cemetery		
☐	Hospital, hospice, doctor, or local authority		
☐	Close family members or key decision-makers		
☐	Attorney, estate contact, or trusted advisor		
☐	Employer, union, or benefits contact, if urgent		
☐	Insurance contact or policy location		
☐	Bank or financial institution - gather only		
☐	Housing, landlord, mortgage, or utilities		
☐	Care arrangements for pets or dependents		
☐	Mail, keys, phone, wallet, vehicle, or home access		

Additional urgent tasks or reminders

5. Decisions Not to Rush

Before you sign or agree to anything

Ask for written information whenever possible. Do not rush major financial decisions or sign contracts you do not understand. Ask questions when pricing, timing, legal duties, or family roles are unclear.

Questions to ask before signing or paying

- [ ] What exactly is included in this price?
- [ ] Can I receive an itemized written estimate?
- [ ] Which decisions are urgent, and which can wait?
- [ ] Are there lower-cost or alternative options available?
- [ ] Who has legal authority to make this decision?
- [ ] What documents do you need from us?
- [ ] What happens if the family needs more time?

Services, costs, or contracts to review carefully

Family concerns, disagreements, or sensitivities to handle carefully

Questions for attorney, funeral director, insurance company, doctor, or other professional

6. Next 7 Days - Notes and Priorities

Use this last page to turn scattered information into a simple plan. Keep the list short and practical.

Top 3 priorities

Priority 1

Priority 2

Priority 3

People who are helping and what they are handling

Documents or information still missing

Next appointments, calls, deadlines, or follow-ups

For more complete guidance

For step-by-step support, document organization, checklists, and practical guidance for the days and weeks after a loss, see the full After the Loss editions at AfterTheLoss.net.

AfterTheLoss.net

Tip: save a copy before filling it in, then print or share only with trusted people as appropriate.