



Free First 48 Hours Quick Action Sheet

A practical starter guide for families in the United States after a loss — with a planning-ahead checklist for important wishes and information.

IMPORTANT NOTICE

This free starter sheet is provided for informational and educational purposes only. It does not constitute legal, tax, financial, medical, psychological, or other professional advice. Laws, procedures, and institutional requirements may vary by state, county, agency, provider, and individual circumstances in the United States.

The first goal is not to do everything — the first goal is to **create order**. Use this sheet as a calm starting point. Write things down, and move one step at a time.

PART ONE — FIRST 48 HOURS

1. First Priorities

- Confirm the person's full legal name.
- Write down the date, time, and place of death.
- Identify one main family contact or decision-maker.
- Start a written log for calls, names, notes, receipts, and next steps.
- Keep important papers, keys, wallet, phone, and personal items in one safe place.
- Avoid rushed decisions — a calm pause can prevent mistakes and family conflict.

2. Who to Contact First

- Close family members or the legally responsible person.
- A funeral home, crematory, hospice, hospital, or local authority.
- A trusted person who can help with phone calls or logistics.
- An employer, attorney, estate contact, clergy member, or advisor, if urgent.
- Anyone who must be notified quickly for medical, legal, or caregiving reasons.

Name	Role	Phone / Email	Next Step

3. What to Gather

- Photo ID or other identifying information.
- Social Security information, if safely available.
- Keys, phone, wallet, and other essential personal items.
- Recent mail, bills, or insurance papers.
- Any written funeral wishes, prepaid funeral documents, will, trust, or estate papers.
- Names of professionals already involved: attorney, financial advisor, doctor, funeral director.
- Password or digital access instructions, only if already lawfully available.

→ Do not begin canceling accounts immediately. Gather first, then decide what needs action.

4. 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 fully understand.
- Do not discard documents too early.
- Do not divide personal belongings in the first hours unless urgently necessary.
- Ask questions when something feels unclear.

PART TWO — PLANNING AHEAD

Planning ahead means leaving fewer unanswered questions for the people who may one day act on your behalf. You do not need to make every decision at once — start with what matters most.

5. Funeral or Memorial Preferences

- Preferred arrangement: burial, cremation, or another lawful option in your state.
- Preferred funeral home, cemetery, mausoleum, or crematory.
- Any customs, traditions, religious elements, or family practices.
- Music, readings, prayers, poems, or personal messages to include.
- Clothing, jewelry, military items, or personal objects to be used.
- Preference for flowers, charitable donations, or another tribute.
- Who should be contacted first about service arrangements.

6. People Involved

- A trusted person who can communicate your wishes.
- Family, friends, clergy, or advisors to be notified.
- Anyone to speak, read, sing, or participate in a service.
- Pallbearers or honorary participants, if desired.
- Any family sensitivities or special circumstances that may require care.

7. Final Disposition

- Cemetery, burial plot, mausoleum, or scattering location, if applicable.
- Who should keep an urn, ashes, or important keepsakes.
- Wishes for a headstone, grave marker, or inscription.
- Location of prepaid funeral, cemetery, or burial documents.

PART THREE — INFORMATION YOU MAY NEED

Personal Information

- Full legal name.
- Date and place of birth.
- Parents' names (incl. mother's maiden name).
- Current and previous important addresses.
- Marital status and spouse's name, if applicable.
- Location of Social Security information.

→ Do not store a full Social Security number in an unsecured document.

Affiliations & Memberships

- Religious or spiritual community.
- Fraternal or civic organizations.
- Professional associations or unions.
- Volunteer groups or charitable organizations.
- Special recognitions, awards, or honors.

Military Service

- Branch of service and rank.
- Dates of service and date of discharge.
- Location of discharge papers.
- War, conflict, or duty period, if applicable.
- Military honors or benefits information.

For decisions involving legal, financial, funeral, medical, insurance, tax, estate, or family matters, contact the appropriate qualified professionals. This checklist is a practical starting point only.

■ **AfterTheLoss.net**

For more complete guidance, document organization, and step-by-step support — see the full After the Loss editions.

www.aftertheloss.net