

The Eirene Guide to

End of Life Planning

Checklists that help you navigate life after
death



Pre-planning

- Gather proper identification and vital contact information.
- Make a list of all the debts, if there are any.
- Consider registering as an organ donor.
- Create a list of all open accounts and finances and their passwords.
- For those accounts, identify the ones that need to be closed.
- Gather and provide access to valuables.
- Gather or provide all information required for a death certificate.
- Locate and centralize important documents and store for easy access.
- Make sure loved ones will have the right access to assets.
- Share your final wishes.
- Sort out your will and ensure everything is accounted for.
- Organize all your social media accounts.





Planning the service

- Determine what type of burial or memorial you'd like.
- Choose your casket and/or urn.
- Choose and contact the officiant.
- Pick out your floral arrangements.
- Identify readings and music for the ceremony.
- Create or order programs for the ceremony.
- Choose photos for the memorial.
- Determine what the memorial stone or urn engraving will say.
- Choose where you'll be keeping or spreading ashes.
- Take time to explore green funeral options.
- Inform friends and family of service information.
- Purchase a guestbook.

Day of Death

- Contact immediate family and close friends.
- Obtain a legal pronouncement of death.
- Gather the information needed for a death certificate.
- Determine how many death certificates you'll need.
- Make arrangements with a funeral home or crematorium.
- Contact a service like Eirene to manage the process up until the memorial.
- A funeral home or crematorium will help you organize transfer.
- Organize for body donation to science, if applicable.
- Arrange organ donation, if applicable.
- Gather all your financial information.
- Contact employer.
- Set up care for any dependents or pets.





Day after death

- Dispose of perishable items in the home
- Notify the executor of the Will
- Freeze all active credit cards
- Close any open accounts
- Locate important documents for easy access
- Contact Service Canada to find out if benefits are available to the estate or legal representative from social programs
- Secure homes and cars
- Locate estate assets and safety deposit box, if applicable
- Maintain a record of all decisions made, steps taken, and financial transactions
- Notify all beneficiaries



Within 72 hours of death

- Contact landlord (if applicable).
- Create an online memorial and online obituary.
- Determine the type of ceremony to have.
- Identify whether or not you'll need financial assistance for the arrangements.
- Determine your flower and donation policy.
- File a life insurance claim.
- Obtain multiple copies of the death certificate.
- Notify the Canada Revenue Agency to settle the taxes of the person who has died, and to transfer benefits to a survivor.
- Contact Social Insurance Registration to cancel deceased's Social Insurance Number.
- If the deceased is in receipt of benefits (such as the Canada Pension Plan) you may wish to contact Service Canada.

1-2 weeks after death

- Perform a more thorough check of the person's home.
- Settle any outstanding debts..
- Close out your loved one's business (if applicable).
- Notify any religious, fraternal, and civic organizations.
- Prepare a final tax return.
- Start the probate process with the will.
- Cancel insurance policies.
- Determine any employment benefits.
- Notify post office to redirect mail, if appropriate.
- Notify phone and utility companies to change the name on bills.
- Remove name of deceased from mailing lists.
- Contact charities whom received automatic financial support from the deceased.
- Contact Land Title Office regarding removing deceased's name from title of property.



3-4 weeks after death



- Cancel any ongoing prescription refills.
- File any outstanding claims for health insurance.
- Inform creditors know that a death has occurred.
- Obtain copies of outstanding bills.
- Prepare paperwork for the settlement of the estate.
- Contact a tax accountant.
- Notify credit reporting agencies.
- Cancel the person's driver's license.
- Memorialize your loved one's Facebook account.
- Close all other social media and email accounts.
- Cancel the deceased's passports.

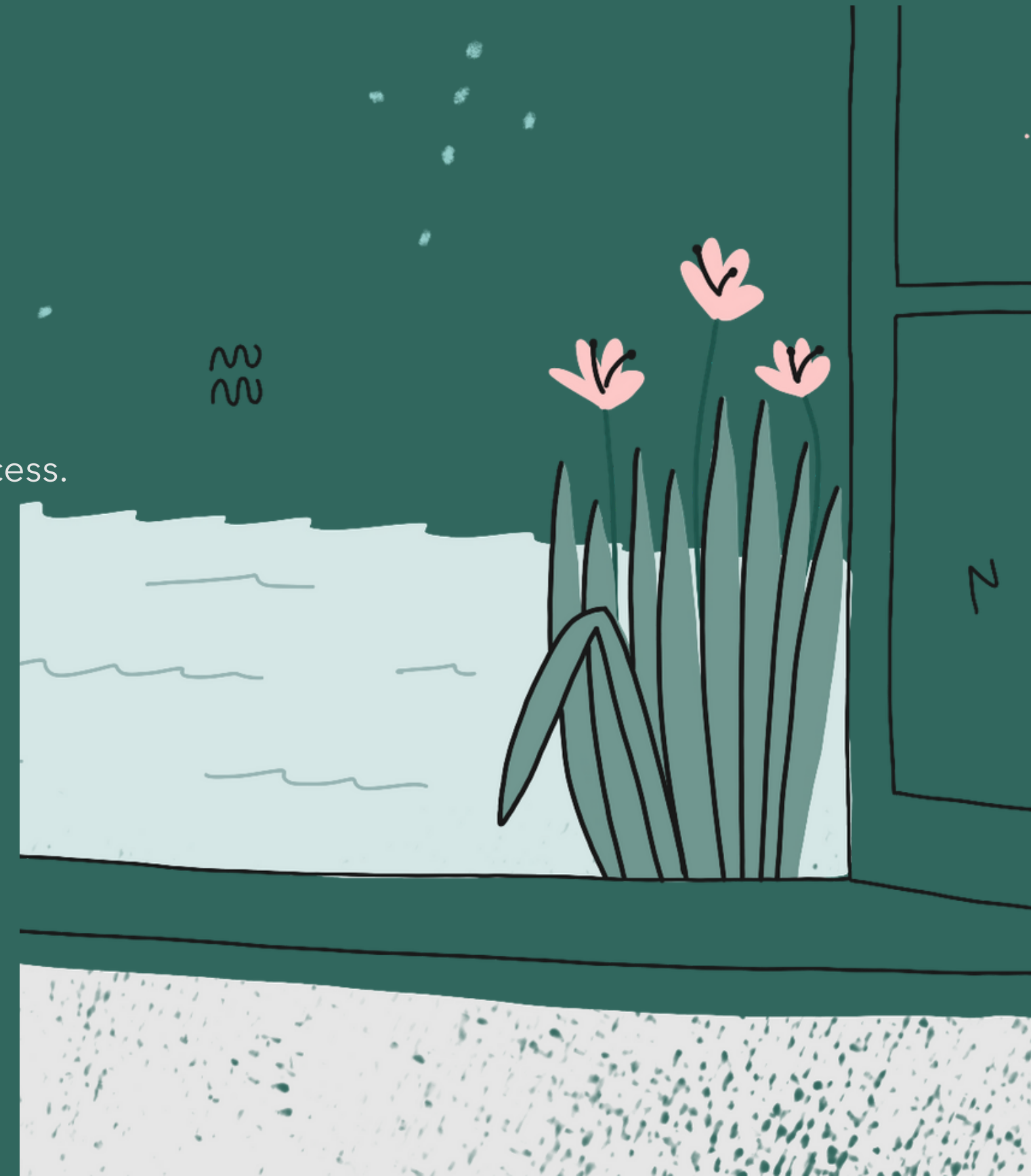
1-3 months after death

- Contact the Ministry of Transportation.
- Execute the will with the help of your lawyer.
- Notify the registrar of voters.
- Organize and distribute deceased's personal belongings.
- Pay off and terminate any mortgages.
- Pay off remaining credit card balances.
- Remove loved one from marketing and mailing lists.



Later down the line

- Dive into a good book or other helpful online resources.
- Check out our blog at www.eirene.ca/blog for a list of helpful resources.
- Organize photos and slides.
- Seek therapy or local grief support groups if needed.
- Send thank you notes to those particularly supportive of you through this process.
- Update your own life insurance policy.
- Update your will.



Eirene is here to help.

Planning ahead for anything in life can benefit you, it's true. But when it comes to pre-planning and saving for your funeral, it's often something that we never think about doing, or even consider talking about with loved ones. Our checklists aim to help you through a tough time. By taking the time to pre-plan, you can save yourself, and your loved ones time and headaches.

We at Eirene are on a mission to provide the most cost-efficient and transparent end-of-life solutions possible. Contact us today to learn how we can help make a tough time, a bit easier.

Visit www.Eirene.ca to learn more about our offerings.

