



Burdett & Sanford

F U N E R A L H O M E

EXPERIENCE • COMMITMENT • TRUST

Family Priority Checklist

Priority One

Vital Records Request
(Birth/Marriage Certificate)
Bank(s) and Credit Union(s)
Accountant/Tax/Financial
Planner

Notify Social Security
Claim Life Insurance Benefits
Change Beneficiary
Executor/Trustee/Administrator

Attorney
Brokers/Investment Managers
Pension/Annuity
Transfer Home/Automobile(s)

Priority Two

Newspaper Delivery
Appraiser
Finance/Loan Company
Mortgage Loan(s)
Credit Cards (Change or Cancel)
Request for Credit Report
Umbrella Liability Insurance
Vehicle Insurance

Disability Insurance
Landlord, Leased Property
Manager of Investment Property
Tenant(s) of Investment
Property
Telephone/Gas/Water/Garbage
Internet Providers

Doctor/Hospital/Nursing Home
Cell Phone Provider
Security Company
Rented Furniture/Appliance
Company
Cancellation of Driver's License
Lawn Maintenance Company
Meals on Wheels
Dry Cleaner

Priority Three

Automobile/Boat Maintenance
Jeweler
Travel Pass (bus/air/rail)
Travel/Purchase Point Rewards
Program
Travel Agent
Auto Club

Memberships
(professional/social)
Memberships (general)
Pharmacy
Service Club(s)
Pest Control
Heating/Air Conditioning
Service

Pool/Spa Service
Mail Order/Mailing Lists
Magazine Subscription(s)
Dentist
Veterinarian
Church Secretary

11 Maple Avenue • Oakfield • New York 14125 • (585) 948-5325

Fax: (585) 948-5402 • info@bataviafuneralhomes.com

www.burdettandsanford.com