



**INCLUSION**  
**INSURANCE GROUP**

# Family Roadmap

A Guide to Your Loved Ones

Prepare for you by:

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# Your Final Expense Roadmap

A step-by-step guide to help families through one of life's most difficult times.

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## 1. What to Do Immediately

- Call 911 or the hospice nurse (if applicable).
  - Notify close family members.
  - Contact the funeral home (or coroner if unexpected).
  - Gather essential documents such as ID, insurance policies, and advance directives.
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## 2. What to Do in the First Few Days

- Meet with the funeral home to arrange services.
  - Contact clergy or an officiant if you'd like a ceremony.
  - Write and publish an obituary to honor your loved one.
  - Notify friends, family, and the employer of your loved one.
  - Secure the home, pets, and personal belongings.
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## 3. What to Do in the First Few Weeks

- Order multiple copies of the death certificate (10–15 is common).
- Notify Social Security and any pension or retirement offices.
- File insurance claims (life, final expense, or other policies).
- Contact banks, mortgage, utility, and credit card companies.
- Review the will or estate plan and begin the probate process if needed.
- Secure online accounts and close or update social media/email.

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#### 4. Long-Term Considerations

- Complete the estate process and settle remaining financial matters.
- Review and update your own beneficiaries, insurance, and retirement accounts.
- Seek grief support through friends, counseling, or support groups.
- Begin planning your own final expense arrangements to spare your loved one's future stress.

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#### 5. Peace of Mind for the Future

Planning ahead is one of the greatest gifts you can give your family.

Taking the time now to put your own final expense plan in place provides comfort, clarity, and security.

 *Schedule your free consultation with Inclusion Insurance Group today and let us help you protect the people you love.*