



JSSA HOSPICE ARRANGING YOUR AFFAIRS

From our experience with Hospice families, we have learned that planning ahead offers some personal peace of mind. We are providing you with this planning guide compiled from a number of sources. Not every item will apply, but we hope that overall this guide is helpful.

- Funeral Arrangements.** Funeral providers are required to give their “General Price List,” detailing the types of services offered and their costs, to anyone who asks about funeral services. If you are Jewish, ask your social worker about arrangements available through the Jewish Funeral Practices Committee of Greater Washington.
(<http://www.jewish-funerals.org/jewish-approach>)

- Obituary Notices.** You may wish to begin drafting obituary notices. Funeral directors are usually able to assist with this and with placing the notice. The Washington Post has two types of obituary notices listed below (and smaller local newspapers also run obituary notices).
 - The “Death Notice” is a small, paid classified announcement that lists the funeral or memorial arrangements, survivors, and, if desired, a designated organization to which memorial contributions may be sent. JSSA Hospice would be honored to be a recipient. (JSSA Hospice, 6123 Montrose Road, Rockville, MD 20852. Attn: Hospice Director)
 - At the discretion of the Washington Post, the “News Obituaries” section publishes a more extensive obituary at no cost. This information may be submitted by telephone or fax and is often edited by the Post. It does not list funeral or memorial service arrangements.

- List of Relatives and Friends.** Prepare a list of relatives and friends to be notified. You may wish to consider asking friends to assist you with phone calls.

- Important Information.** Collect and photocopy the following information, or know where it is located:
 - Insurance policies.** These may include life, mortgage, and employer-provided insurance. Clubs, associations, and credit cards sometimes provide life insurance coverage as well.
 - Social Security numbers** for the patient, spouse, and any dependent children
 - Military discharge** documents

- Marriage certificate** if the spouse of the patient will be applying for benefits
- Birth certificates** for dependent children
- The patient's will**
- A list of all of the patient's property:** real estate, stocks and bonds, bank and money market accounts (including location and account number), safe deposit boxes, etc.
- Computer logins and passwords** to access relevant stored information.

- Saying Thanks:** You may wish to consider naming JSSA Hospice or another JSSA program in your estate plans so that others will benefit from JSSA's compassionate care. If you would like information about how to do so, please contact JSSA's Director of Gift Planning at 301-610-8344. If you wish to make a gift online, go to <http://www.jssahospice.org/giving> and select "Hospice" through the drop-down menu under "Gift Designation Selection." Gifts may also be sent directly to JSSA Hospice in memory of your loved one or in honor of a member of the Hospice team. The address is: JSSA Hospice, 6123 Montrose Road, Rockville, MD 20852.

Within the first 30 days following the death, you may wish to:

- Arrange to get 10-20 certified copies of the death certificate. You may need to give a copy to many of the offices or agencies you contact. The certified copies can usually be obtained through the funeral director.
- Establish an "estate" bank account.
- Notify all insurance companies involved and file claims.
- Check medical policies for any time limitations for filing claims and for additional coverage.
- Report the death to Social Security – 1-800-772-1213.
- Apply for Social Security benefits and pension benefits: www.ssa.gov.
- If appropriate; report the death to the Veteran's Administration and apply for benefits.
- Notify deceased person's employer(s) to file for benefits.
- Notify holders of IRA accounts.

Within the next 60 days, you may wish to:

- Select an attorney to represent your interests and to file your family member's will. Using an attorney is not a requirement but may prove helpful. You will need to provide the lawyer with a copy of the will and certified copies of the death certificate.
- Choose an accountant for financial affairs and for filing estate and inheritance tax returns.

- Consult an attorney regarding transfers of real estate or automobile titles. If you wish to donate a car, JSSA has an easy, one-call process: simply dial 301-585-CARS (2277) and leave a message to arrange for free pickup.
- Update auto and homeowner insurance policies and titles.
- Cancel joint credit card accounts or change all credit cards to your name.
- Change the name under which utilities are billed; consider changing the listing in the telephone directory.
- Review the beneficiaries on your life insurance policies; confirm you own medical insurance coverage.
- Revise your will if necessary