



CHECKLIST AT DEATH

When someone passes away, it's hard to know where to start. Here are some immediate items you will want to handle.

1) NOTIFICATION:

- ___ Contact close family and friends of the deceased to let them know of your loved one's passing
- ___ Contact the employer of the deceased to let them know of their passing
- ___ Notify Creditors
- ___ Notify Social Services or other entitlement/welfare programs of your loved one's passing. If you are a spouse, or if you have minor children at home, check to see if any of you are eligible for benefits.

2) FUNERAL:

- ___ Select funeral home
- ___ Make arrangements with the funeral home
- ___ Plan services/burial
- ___ Write obituary

3) GETTING THINGS IN ORDER:

- ___ Have all mail forwarded to you
- ___ Develop a short-term plan for utilities/monthly bills
- ___ Secure the property
- ___ If your loved one had pets, find a place for pets

- ___ Order certified copies of the Death Certificate

We suggest requesting 8-10 copies.

You will need them to transfer bank and other financial accounts, as well as to send to insurers and others who may be holding assets or benefits payable to the estate.

- ___ Cancel their driver's license
- ___ Check the safe deposit box/safe for important documents

4) ITEMS TO GATHER FOR YOUR ATTORNEY:

- ___ A copy of legal documents, such as Wills/Trusts/estate plan, in case there are prearranged wishes
- ___ A list of heirs/next of kin
- ___ Real estate owned
- ___ Bank account information
- ___ Retirement accounts
- ___ Business interests

Contact us early in the process to help you through estate administration.