

# STEPS TO TAKE AFTER A LOVED ONE HAS PASSED AWAY CHECKLIST

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## Immediate Tasks:

- Contact authorities to get a legal pronouncement of death.
  - Arrange for organ donation or other bequeathal instructions, if applicable.
  - Decide what you'd like to do with your loved one's body and arrange transportation.
    - Call a funeral home or mortuary; or
    - Call a cremation provider, if one is planned and not available from the funeral home.
  - Arrange care for any pets or dependents.
  - Secure/lock major property;
  - Notify immediately family and close friends.
  - Find the last will and testament and advance directives that relate to funeral, cremation, and/or burial plans.
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## What To Do Within a Few Days:

- Enlist help for the funeral.
  - Notify others, if applicable:
    - Executor of the estate;
    - Primary care provider;
    - Employers, military units, volunteer organizations, or any other place that your loved one may be expected to be;
    - Veterans Affairs;
    - Post Office; and/or local newspaper.
  - Funeral Arrangements:
    - Finalize funeral plans;
    - Begin burial plans, if not already planned, and make any arrangements needed; and/or
    - Seek financial assistance for the funeral and burial, if needed.
  - Other Tasks:
    - Perform a more thorough check of their residence, home, or other properties. Do what is necessary to secure and care for them, such as removing or securing valuables, cleaning out their refrigerator, removing trash, or setting up timed lights to make it look occupied.
    - If the home is vacant, consider notifying the police (dial a non-emergency number), landlord, or property manager and cancelling unnecessary home services such as mail, newspaper delivery, cable service.
    - Enlist help for the funeral, if not previously planned.
    - Organize a post-funeral gathering
    - Invite those close to you and/or the deceased to the wake and/or service. Arrange announcements with the details of the location, date, and time have been set for them.
    - Keep track of well-wishers who send cards, flowers and donations so that you can acknowledge them later.
    - Read and allow others to read the ethical will, if there is one.
    - Remove your loved one's personal property from their home and/or room they lived in a nursing home, assisted living facility, or hospice facility.
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## What To Do Within a Few Weeks:

- Send thank-you notes.
- Get copies of the death certificate.
- Find and organize all the documents you will need to settle the estate:
  - Birth certificate;
  - Social Security card;
  - Marriage license or certificate;
  - Domestic Partnership Registration;
  - Court documents for adoptions and divorce (including any property settlement agreements, name changes, prenuptial agreements, etc.);
  - Driver's license;
  - Passport, citizenship, immigration and/or alien registration papers;
  - Community Property Agreements;
  - Military discharge papers (DD-214);
  - Deed to burial property;
  - Copy of funeral pre-arrangements;
  - Life insurance policies;
  - Stock certificates;
  - Real estate titles;
  - Loan paperwork;
  - Bank and retirement account statements;
  - Any unpaid bills or indicators of other debts or IOUs;
  - Survivor annuity benefit papers;
  - Employer/retirement benefit (pension) plans, pension/profit-sharing plans, etc.;
  - Veterans' benefit records;
  - Disability payment documents (State, Veterans', etc.);
  - Income statements for the current year (Social Security, pension, IRA's, annuities, employment and other income records);
  - IRS income tax returns (for the current and previous year) and IRS gift tax returns (if any, for all years);
  - Property tax records and statements;
  - Business interests held, financial statements and agreements, contracts, etc.; and/or
  - Contact the attorney who will help you settle the estate, including starting the probate process if there is a will.
- Advise all creditors in writing that your loved one has died.
- Settle the Estate:
  - Start the probate process with the will;
  - Meet with a probate attorney;
  - Arrange permanent custody of dependents;
  - Meet with an accountant to discuss estate taxes;
  - File claims with life insurance companies;
  - Check for any life insurance benefits available through existing credit card or loan accounts;
  - Call their employer and ask about employee benefits they may be eligible for, such as a 401 (k), pension, or company benefits;
  - Notify any banks or mortgage companies;
  - File any outstanding claims for health insurance or Medicare;
  - Contact Equifax, Experian, and TransUnion about copies of recent credit reports;
  - Identify and pay important bills;
  - Deal with any debt;
  - Reach out to any financial advisors or brokers;
  - Contact a tax accountant;
  - Close credit card accounts; and/or
  - Sort through and decide what to do with clothes, household items, personal items, motorized vehicles, and other possessions.
- Other Tasks:
  - Contact the Social Security office;
  - Arrange permanent home for any pets;
  - Choose a memorial monument (headstone);
  - Handle Medicare or other health insurance;
  - Notify life insurance companies;
  - Notify credit reporting agencies;
  - Cancel any scheduled medical, therapy, or dental visits;
  - Cancel their driver's license;
  - Cancel memberships in organizations;
  - Cancel prescriptions and subscriptions;
  - Notify the Registrar of Voters;
  - Update your will if affected by your loved one's death;
  - Update beneficiaries on your life insurance policies, if necessary; and/or
  - Remove them from marketing and mailing lists.
- Dispose of unused medications.
- Find and close all digital accounts and social media presence.