

What to do when a loved one dies: Checklist for Families

Below is a checklist of tasks to be addressed at this difficult time. While many actions are best handled by an experienced estate/probate attorney, family members can handle some actions on their own. This checklist is not all-encompassing, but should assist the family with some basic matters following the death of a loved one.

Actions to be Taken by Family Members

- Notify immediate family and friends.
- Arrange care for pets, if there are any.
- If necessary, decide on a plan to care for dependent children and surviving spouse.
- Contact funeral home to set funeral arrangements after reviewing loved one's expressed wishes for funeral and burial.
- Gather vital statistics on loved one for funeral home. Notify clergy, write obituary, find pictures to display at funeral, provide clothing for burial.
- Evaluate the need for security at loved one's residence.
 - Cancel home deliveries and newspapers/magazines.
 - Notify Post Office to change mailing address or to hold mail.
 - Evaluate whether there is perishable property in the house.
 - Notify all utility companies.
- Request and obtain 10 death certificates.
- Keep records of all payments for funeral and other expenses.
- Locate original Will (and Trust).
- Gather all records including personal identification, any and all bank accounts, checkbooks, life insurance policies, credit cards and anything else pertaining to finances.
- Notify broker, accountant, financial advisor, etc.
- Find titles to all properties, automobiles and burial plots.
- Collect bills and hold until probate. Notify creditors.
- Safe deposit box – at least 2 people should be at box opening.*
 - List all contents in detail on paper.
 - Both persons sign and date at the bottom of the list.
 - Remove Will, Trust, life insurance policies, etc. and put anything else back in the box.

* *If there is any danger of a Will being contested, a conflict of interest between Personal Representative, family, or beneficiaries, do not go to the safe deposit box without an attorney.*

- Death Notifications to make:
 - Social Security Administration
 - Department of Veterans Affairs
 - Health Insurance Companies
 - Life Insurance Companies
 - Retirement/Pension Companies
- Notify home, auto and public liability insurance agency.
- Cut up credit cards and notify credit card companies.
- Close any online accounts and email accounts.
- Investigate the following:
 - Social Security benefits
 - Life Insurance
 - Union death benefits
 - Veteran's burial allowance & Veteran's benefits
 - Retirement Employee benefits such as IRA accounts, pension and retirement plan death benefits.
 - Medical reimbursements
 - Refunds on insurance or cancelled subscriptions, etc.
- Meet with CPA to prepare loved one's last income tax return.

Call an Attorney to Assist with the Following

- Review and analyze the Will and/or Trust.
- File for Administration of Estate or Probate of Will, if needed.
- Evaluate joint tenancy assets (such as bank accounts, real estate, brokerage accounts, and safe-deposit boxes). Arrange for termination of joint tenancy asset(s) so surviving joint tenant gets clear title to asset(s).
- Guide and counsel the Personal Representative in administering the loved one's estate.
- Review with family members the impact of loved one's death on their own estate planning such as: re-draft wills, trust, make gifts, review documents.



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