

What to do after losing a loved one

We understand this is a difficult time for you. There is so much to think about and do and navigating it all can feel overwhelming. This checklist can help you with some of the more common things you will need to address. Many of these things will be discussed when you meet with the probate attorney

1. Gather documents and keep in a secure and accessible location.

<input type="checkbox"/> Last Will and Testament (original) or Trust documents	<input type="checkbox"/> Deed and Titles to Property
<input type="checkbox"/> Birth Certificate	<input type="checkbox"/> Property tax records and statements
<input type="checkbox"/> Social Security Card	<input type="checkbox"/> Mortgage Information
<input type="checkbox"/> Driver's License	<input type="checkbox"/> Oil, Gas, Mineral or Surface Rights and Income
<input type="checkbox"/> Passport	<input type="checkbox"/> Vehicle titles
<input type="checkbox"/> Copy of Obituary or Funeral Program	<input type="checkbox"/> Stock Certificates
<input type="checkbox"/> Marriage License	<input type="checkbox"/> Bank Account Information
<input type="checkbox"/> Court documents for adoptions and divorce	<input type="checkbox"/> Investment Account Information
<input type="checkbox"/> Military Discharge Papers (DD214)	<input type="checkbox"/> Recent Income Tax Forms and W-2 Forms
<input type="checkbox"/> Veteran's Affairs number and benefit records	<input type="checkbox"/> Income statements for the current year (Social Security, pension, IRA's, annuities, employment, and other income records)
<input type="checkbox"/> Health Insurance Policies	<input type="checkbox"/> IRS income tax returns (for the current and previous year)
<input type="checkbox"/> Life Insurance Policies	<input type="checkbox"/> Disability payment documents
<input type="checkbox"/> Employer/retirement benefit (pension) plans, pension/profit-sharing plans, etc.	<input type="checkbox"/> Loan and Installment Information
<input type="checkbox"/> Death Certificate (original)	<input type="checkbox"/> Current Credit Report
<input type="checkbox"/> Death Certificates of predeceased spouse or children	<input type="checkbox"/> List of safety deposit boxes, where to find keys, and names of authorized users
<input type="checkbox"/> Birth Certificates of minor children	<input type="checkbox"/> Child Support documents

2. Set up an appointment with a Probate Attorney

3. Send thank you notes

Who can help with this? _____

4. Notify:

<ul style="list-style-type: none"> ○ Social Security (800) 772-1213 • <i>The funeral home will notify social security. Social Security will send notification to Medicare; however, you may need to follow up in a few weeks.</i> • <i>Ask about survivor's benefits</i> 	<ul style="list-style-type: none"> ○ Financial Advisor and Accountant
<ul style="list-style-type: none"> ○ Veteran's Administration (if applicable) (800) 827-1000 	<ul style="list-style-type: none"> ○ Employers
<ul style="list-style-type: none"> ○ Life Insurance Companies 	<ul style="list-style-type: none"> ○ Credit Bureaus
<ul style="list-style-type: none"> ○ Pension Service Agencies 	<ul style="list-style-type: none"> ○ US Postal Service

5. Cancel: (for deceased only)

<ul style="list-style-type: none"> ○ Health Insurance 	<ul style="list-style-type: none"> ○ Digital Subscriptions
<ul style="list-style-type: none"> ○ Other Insurance Policies 	<ul style="list-style-type: none"> ○ Prescriptions
<ul style="list-style-type: none"> ○ Credit Card Accounts 	<ul style="list-style-type: none"> ○ Cell Phone Service
<ul style="list-style-type: none"> ○ Driver's License 	<ul style="list-style-type: none"> ○ Organization Memberships
<ul style="list-style-type: none"> ○ Voter's Registration 	<ul style="list-style-type: none"> ○ Newspaper, Subscriptions

Things to Consider

1. Contact an accountant to file income tax

2. Automobile Insurance

Do you want to maintain the automobile insurance?

Will the vehicle be idle or sold?

3. Health Insurance

Are the surviving spouse and dependents eligible for continued coverage?

- Contact the insurance company.

4. Residence

Was the residence rented or leased?

- Terminate the lease
- Vacate premises
- Place property in storage

Was the residence owned?

Was the property bequeathed to someone?

Name: _____ Relationship: _____

Contact Information: _____

Do you want to sell the property?

- Title Search
- Property Appraisal
- Real Estate Agent

5. Bank Accounts

Is the account a joint account?

Does the account have a beneficiary?

6. Property

Identify items specifically bequeathed

Appraise valuable items

List places you can donate items (in the Cypress area), if applicable:

Organization: Cy-Hope - The Hope Chest
12015 Barker Cypress Rd, Cypress, TX 77433 (281) 758-1003

Organization: Angel's Attic - Cypress Assistance Ministries
12930 Cypress N Houston, Cypress, TX 77429 (281) 955-7684

Organization: Tomball Emergency Assistance Ministries
300 W Main Street, Tomball, TX 77375, (281) 255-6967

7. Medications

Are there leftover medications you need to dispose of?

Take Back Location near me: _____

Check with your local law enforcement office or the DEA website for information.

8. Digital Media

Contact email providers and social media accounts