10 Commonly Missed Financial Organization Tasks *for* Loved Ones

When organizing a loved one's finances during illness, aging, or for end-of-life planning, there are important tasks that often get overlooked. Use this checklist to make sure no critical steps are missed.

- [ ] **Funeral Home Arrangements** Check if pre-paid plans exist & finalize service details.
- [ ] **Cemetery/Burial Plot Arrangements** Locate deeds, plot ownership paperwork & prepaid contracts.
- [ ] **Beneficiary Designations** Review & update beneficiaries for retirement accounts, life insurance, etc.
- [ ] **Recurring Bills & Auto-Payments** Cancel or update subscriptions, utilities, & phone plans.
- [ ] **Passwords & Account Access** Document logins for banking, investments, & email accounts.
- [ ] **Life Insurance Policies** Search for any existing life insurance policies.
- [ ] **Debt & Loan Obligations** Identify all mortgages, car loans, credit cards, & other debts.
- [ ] **Important Legal Documents** Gather wills, trusts, POAs, marriagedivorce records, military discharge papers, & deeds.
- [ ] **Income Sources** Redirect or stop pensions, Social Security, annuities, rental income, royalties, etc.
- [ ] **Tax Records & Final Returns** Find prior tax returns & plan for final tax filings.

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