INTEGRITY LAW
Wills & Trusts

Planning Today.
Peace of Mind Tomorrow.

What to Do When a Loved One Dies

FIRST 30 DAYS CHECKLIST

A step-by-step guide to help you navigate important tasks during the first 30 days after a loved one's passing.

FIRST 24–72 HOURS

- [ ] Confirm the death and follow any medical or hospice provider instructions.
- [ ] Notify family members and close friends.
- [ ] Contact the funeral home or cremation provider to make arrangements.
- [ ] Obtain multiple certified copies of the death certificate (usually 10–15).
- [ ] Locate important documents (will, trust, insurance policies, etc.).
- [ ] Secure the home, vehicles, and personal property.
- [ ] Notify the deceased's employer, if applicable.
- [ ] If applicable, make arrangements for pets and dependents.

WEEK ONE

- [ ] Locate the will, trust, and other estate-planning documents.
- [ ] Notify the deceased's bank(s) and financial institutions.
- [ ] Contact life insurance companies to begin claims.
- [ ] Notify Social Security (1-800-772-1213).
- [ ] Notify the Veterans Administration, if applicable (1-800-827-1000).
- [ ] Contact the deceased's attorney, accountant, or financial advisor.
- [ ] Notify the deceased's health insurance provider (Medicare, Medicaid, or private insurance).
- [ ] Review and redirect mail through the USPS (www.usps.com).
- [ ] Cancel or pause unnecessary subscriptions and services.
- [ ] Begin a list of all assets, debts, and ongoing bills.

WEEKS TWO–FOUR

- [ ] File life insurance claims and follow up as needed.
- [ ] Notify retirement account providers (401(k), IRA, etc.).
- [ ] Notify the deceased's creditors (credit cards, loans, etc.).
- [ ] Transfer or retitle assets according to the will, trust, or beneficiary designations.
- [ ] Contact the Department of Motor Vehicles (DMV) regarding vehicle titles.
- [ ] Notify the county assessor regarding real property (when applicable).
- [ ] Close or transfer digital accounts (email, social media, etc.).
- [ ] Keep detailed records of all communications and expenses.
- [ ] Consider an estate tax review if the estate may be large enough to require a federal or state estate tax return.

DOCUMENTS TO GATHER

- [ ] Certified death certificates
- [ ] Will and/or trust
- [ ] Identification (driver's license, passport)
- [ ] Social Security card
- [ ] Insurance policies (life, health, long-term care)
- [ ] Bank and investment account statements
- [ ] Retirement account statements (401(k), IRA, etc.)
- [ ] Deeds and titles to real estate and vehicles
- [ ] Recent tax returns
- [ ] List of creditors and outstanding bills
- [ ] Contact information for attorney, accountant, and financial advisor
- [ ] Any other relevant financial or legal documents

Need help?

Integrity Law is here. Give us a call at 435-277-0529.