



WORRY-FREE WEDNESDAYS

AFTER-DEATH CHECKLIST FOR: _____
(NAME)

NAME OF PERSON
TO COORDINATE
AND/OR MANAGE


First Steps Immediately After a Death

- _____ Determine if any after-death instructions/wishes were documented by deceased to guide decision about management of the body (look for disposition instruction forms)
- _____ Contact funeral home, reduction facility or organization to manage body after death
- _____ Identify who needs to be notified right away – family, friends, employer, caretakers/hospice/health care providers, power of attorney, executor of estate
- _____ Arrange care for minors, dependents, surviving spouse or partner who may need assistance, pets
- _____ Check that property and personal items are properly secured and protected - home, car, business, valuables in a home, etc. (Especially before obituary or death announcement is made public)

Day or Two After

- _____ Make appointment with funeral home or reduction facility (they will notify social security and order death certificates needed for finances, insurance, Veteran’s Admin, etc.)
 - o Copies of death certificate can often be used for official records if a certified original copy is shown in-person to verify its authenticity

Within a Week

- _____ Determine if there are recurring home delivery items that need to be canceled to avoid waste or theft
- _____ Contact attorney, accountant, executor or estate to discover/review what Will/Trusts/End-of-Life plans are in place
- _____ **Locate important financial and legal documents** 
- _____ Begin work on obituary/death announcement and plans for funeral/remembrance/gathering

Within Two Weeks

- _____ Forward mail to responsible party or to be held at post-office (as needed)
- _____ Identify financial matters that need immediate attention – review debts, pay bills, begin to close accounts or cancel payments
- _____ Contact insurance companies and file claim with life insurance company
- _____ Make appointment with social security office to switch benefits to qualified relations (payments stop when death is reported by funeral home)

Within a Month

- _____ Finish gathering and organizing personal and financial documents
- _____ Collect asset and liability information if not in a Last Will & Testament
- _____ If deceased did not have a Will or Trust, and meets a financial threshold, probate may be required for distribution of assets and management of debt
- _____ Change titles on assets - car, home, stocks, other property (as needed)
- _____ Decide how to manage social media accounts if no instructions were given (different platforms have different options for archive/cancel)
- _____ Notify any union or fraternal organizations where there may be benefits

Within Two Months

- _____ Begin to inventory and distribute personal belongings (as appropriate)

After Several Months

- _____ Begin process for filing federal and state income taxes
- _____ Follow up with settlement of assets and financial matters (as needed)

Important Documents (Examples)

- ✓ Wills/Trust Agreements
- ✓ Mortgage documents/Promissory Notes
- ✓ Deeds/Titles
- ✓ Vehicle titles and registrations
- ✓ Insurance Policies (funeral, life, health, accident, long-term care, dental, property, vehicle)
- ✓ Financial Accounts (acct#, username and passwords for: bank, brokerage, stocks, bonds, annuities, credit and debit card, safety deposit box documents and keys)
- ✓ Other financial records (retirement, annuity, pension records, tax returns, financial statements, contracts, etc)
- ✓ Legal Papers (Power of Attorney, adoption and divorce papers, prenuptial/postnuptial agreements, military service papers, social security records, citizenship records, passports, proof of intent to donate organs, etc)
- ✓ Usernames, acct#s and passwords for devices, online apps and subscriptions
- ✓ List of bills, amount and due dates