

2021

Checklist for the Family When a Loved One Has Passed Away



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Please accept our condolences on the passing of your Loved One.

We understand that when a Loved One dies; the anxiety can paralyze the family. Often things which should be done soon are left undone while the family is coping with its grief. After the Funeral Home has been contacted, some additional proactive steps now can avoid regrets later.

❑ **SECURE THE HOME**

After a loved one dies, sometimes relatives, neighbors or even criminals can enter the home and remove valuable possessions or papers. It's a good idea to stop people from coming and going in the house. You should consider changing the locks on the doors because there may be a number of keys floating around that can give unwanted access to the home. In many cases, it may not be a good idea to have a family member move in who hasn't lived there previously. If some family members want to have someone move in, that's a good discussion item for the **Family Meeting** (See below)

❑ **GATHER DOCUMENTS.**

Your loved one may have a file drawer of insurance documents, investment lists, a Will or other estate planning documents. Important papers can sometimes disappear. If there are death benefits or other things that need to be taken care of, it's always better to get those things done sooner rather than later. If you need additional Death Certificates you may contact the Minnesota Department of Health. You may also want to check "Missing Money" for the overlooked money that may have been owed to your Loved One. (See **Resource Contact Information** below.)

❑ **CONTACT EMPLOYERS.**

Often there will be death benefits or other things that will need to be addressed. Past or present employers should be informed of the death as soon as possible so that they can make necessary work arrangements and get the decedent's benefit applications under way.

❑ **HOLD A FAMILY MEETING.**

If an executor or lead family member was nominated by the

decedent, that person should call a family meeting. Now is the time that everyone should communicate and be reassured that everything will be handled properly and out in the open. All family members should be on the same page and (hopefully) trusting of what the family leader is planning to do for the benefit of everyone in the family.

❑ **WATCH THE MAIL**

If a family member will be living at the decedent's home, then the decedent's mail should be kept in one place for the executor's review. If no one will be living there for the time being, the post office should be notified to hold or forward the mail so that it doesn't pile up in the mailbox. Accumulating mail is also an open invitation to burglars or mischief makers.

❑ **CONTACT SOCIAL SECURITY.**

If the decedent was receiving social security benefits those should be stopped immediately. If the decedent's benefits keep getting paid, this can be a headache for the executor to repay them later. What's more, if there are death benefits due to the decedent's dependents, those should get started as soon as possible. If the decedent or their spouse was a veteran, there may also be VA benefits. (See **Resource Contact Information** below.)

❑ **CHECK FOR ORGAN DONOR INSTRUCTIONS.** Many Minnesotans are organ donors. However, the organs may not be transplantable if too much time passes between the death of the donor and the organ removal. In many cases this is 48 hours or less. If the decedent listed donation on his or her driver's license or health care directive, prompt action is necessary. (See **Resource Contact Information** below.)

❑ **CONTACT NEIGHBORS.**

People in the neighborhood are often helpful when a neighbor dies. They can keep an eye out for suspicious activity as well. However, they may not be aware that your loved one has died. Enlist their eyes, ears and assistance.

❑ **NOTIFY THE BANK.**

Your loved one's bank may not be aware of your loved one's passing

unless you tell them. Automatic deposits and withdrawals may continue that may have to be undone later – at considerable inconvenience. Also crooks can sometimes target deceased persons' bank accounts.

❑ **CANCEL CREDIT CARDS.**

In our internet society, credit card data can be stolen or misdirected in a nanosecond. When the credit card owner is deceased, this is a tempting prospect for credit card and identity thieves. Review the card information in the decedent's wallet and mail and notify the credit card companies promptly of your loved one's death.

❑ **CALL A PROBATE ATTORNEY.**

Your Loved One may have an estate that needs to go into the probate process or sometimes probate proceedings are not necessary. In any case you should enlist the legal help of an experienced probate attorney who can handle any needed court proceedings and/or prepare the transfer documents that can settle the estate of your loved one. If you would like us to help you, we can provide a free session consultation about the estate. We welcome your call at **(952) 888-2400**.

RESOURCE CONTACT INFORMATION

♥ Social Security provides death benefits in many cases. The decedent's family benefits may also have to be adjusted. Call them toll-free at **1-800-772-1213**

♥ If the loved one was a veteran or the spouse of a veteran, the family may be entitled to burial services worth up to \$4,000 as well as other benefits. The Toll-Free number for the Veterans Administration is **1-800-827-1000**.

♥ Was the Loved One owed money or did they forget to claim a refund or dividend? Find out at www.MissingMoney.com

♥ Organ donation in Minnesota is facilitated by several organizations including **Life Source**. Their toll-free number is **1-888-536-6283** or their local number is **651-603-7800**.

♥ Additional information and a free confidential consultation on the probate process is available at Peterson Law Office Toll-Free at **1-888-910-5297** or locally at **952-888-2400**