First Steps Checklist

Sit for a moment, breathe through the shock, and think about what is most critical, and how to gather the appropriate information.

1) Who's In Charge

- Do I know who is in charge, if it is not me?
- Do I know this person?
- Do I know how to contact him/her?
- How quickly can he/she take on this responsibility?
- How can I be of assistance *<u>if he/she desires help</u>*?

2) Care Arrangements

- Did this person have dependents – parents, special needs adult children, young children or pets?
- Are there family members, who can possibly accept interim responsibility?
- For young children or grandchildren, can their godparents assist?
- Are there neighbors or friends, who can help?

3) The Estate: Lawyers & Taxes

- Do you have the contact information for the estate lawyer – the one who has the will?
- Has a Tax Identification Number (TIN) been obtained from the IRS for the estate?
- A bank account will need to be opened in the name of the estate to collect the liquid assets.
- Did the deceased have a trusted accountant? If not, or you can ask the lawyer for a recommendation for one, since the estate will need to file tax reports.

4) Whom to Notify?

- Has the immediate family of the deceased been notified?
- Have the neighbors and police been alerted to the situation?
- Has the post office been notified?
- Have service providers been notified – lawn care, housekeepers, home care assistants, dog walker?
- Has the bank, stock broker, financial planner, and/or investment advisor been contacted?

5) Paperwork

a) Personal
- Do I know what the arrangements are for disposal of the body?
- Is there a preference for flowers and/or charitable donations?
- Are their instructions for a memorial service?
- Are there any organizational rituals, such as a Masonic ritual?
- What are the obituary details?

b) Legal
- Do you have a copy of the will?
- Copies of the death certificate will be obtained by the funeral/crematorium director – get more than you think you will need
- Be aware that all proxies, including power of attorney, cease at death

c) Financial
- Was there a life insurance policy(ies)?
- Did the deceased leave a list of their financial accounts and investments?
- Is there someone, who is a joint signer on one or more of the deceased's accounts?
- There will continue to be a tax liability, including tax filings annually on the estate.

d) Administrative
- Do you have access to the passwords for their computer or other electronic devices?
- Do you have access to their social media sites?
- Is there a listing of memberships and/or subscriptions?
- Do you have the necessary information to access their credit cards and other financial accounts on-line?