



POST-MORTEM CHECKLIST

What to Do When a Loved One Passes Away:

- If not in a hospital or hospice, call 911
- Arrange for organ donation, if applicable
- Locate any paperwork/information regarding funeral arrangements
- Contact the funeral home to take your loved one into their care
- Contact Ivan & Daugustinis, PLLC
- Contact family members and employers
- Locate and secure your loved one's important documents, including:
 - Trust
 - Will
 - Birth certificate
 - Marriage license
 - Life insurance policies
 - Most recent tax return
- In addition to basic demographical information, compile the following information in order to finalize the death certificate:
 - Birthplace
 - Place of death and address
 - Occupational history
 - Education level
 - Military status
 - Mother and father's names
- Order ten copies of the death certificate (from the funeral home)
- Contact the Social Security Administration office and the Department of Veteran's Affairs, if applicable
- Notify religious, fraternal or civic organizations
- Cancel any prescriptions or recurring payments for services that are no longer necessary
- Locate and secure any personal property, including automobiles
- If you choose to do so, write an obituary and have it published in your local newspaper

Things **NOT** to do:

- Use the deceased's credit cards
- Use a Power of Attorney – it is no longer valid
- Allow anyone to drive the deceased's automobile
- Pay any bills – this will be taken care of eventually, but some creditors have priority and some debts may not be valid
- Close any bank accounts or roll over any retirement accounts (until you speak with us and your financial advisors)
- Distribute any of the deceased's property

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Trust Administration Checklist*:

- Locate and review trust documents to identify successor trustees, beneficiaries, and plan of distribution.
- Make required filings, including deposit of pour-over will with court, recordation of death certificate, and filing of Notice of Trust.
- Obtain tax ID (EIN) for trust.
- Open a trust checking account for estate administration expenses and prepare to account for all estate administration activities.
- Notify all beneficiaries and provide a copy of the trust.
- Assemble, inventory, and take custody of all assets, including accounts receivable. Determine which assets are held in trust and which are held in grantor's individual name. Insure all property as needed.
- If applicable, file probate for assets held in grantor's individual name.
- Contact all financial institutions holding trust property and notify them that the grantor has passed away and a successor trustee has been appointed.
- Obtain date of death values for all estate assets.
- Manage all investments and abide by the "Prudent Investor Rule."
- Find all debts owed by grantor and determine validity. For all debts paid, obtain receipts or notice of satisfaction.
- File all required tax returns and make all applicable tax elections. Possible tax returns include the grantor's final individual income tax return, trust income tax return, and federal estate tax return.
- Distribute the estate according to the terms and provisions of the trust agreement. Final distributions are to be made only after all debts and expenses of administration have been paid.

*Many of these tasks can be completed by the attorney for the estate