

Steps After the Death of a Loved One.

***This list does not constitute legal advice and is merely a recommendation based on opinion. Always seek the advice of legal counsel immediately after the loss of a loved one before making any decisions or taking any action.**

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| 1 | Request Death Certificate from County Vital Records | Any changes, stops and transfers of accounts will often require proof of passing via a death certificate. | |
| 2 | Make Funeral Arrangements | Look for any applicable burial plans already set up, if applicable. | |
| | Notify Family & Friends | | |
| 3 | Locate Legal paperwork | > <i>Wills.</i> > <i>Trusts</i> > <i>Life Insurance</i> | |
| | Seek Legal Counsel for the Estate | Regardless of whether there is a Will in place or not, it is best to talk with an estate attorney to ensure all the proper steps are taken and correct documentation is filed with the courts | |
| 4 | Locate Assets: | These are typically real estate, personal property, valuables, and money accounts that will eventually be transferred to designated party(its) according to the Will or Court Order. > <i>Property(ies), Keys & Deeds.</i> > <i>Vehicle(s), Keys, Titles & Registration</i> > <i>Safety Deposit Boxes & Keys.</i> > <i>Storage Units & keys</i> > <i>Bank Accounts.</i> > <i>Investment Accounts (401K's, Roth IRA's, etc.)</i> | |
| 5 | Locate Debts: | Notify Credit Bureaus of death and freeze all credit accounts. Negotiate with agencies to resolve or clear debts, when able. If legal counsel advises, then continue to make payments on account and/or pay off any accounts then close them. > <i>Mortgage</i> > <i>Car Payments</i> > <i>Credit Cards</i> | |
| 6 | Locate Monthly Expense Accounts: | Cancel those applicable, and transfer those to the designated Executor/Personal Representative for now. > <i>Utilities. & Trash.</i> > <i>Cable.</i> > <i>Internet.</i> > <i>Cell Phone</i> > <i>Subscriptions (magazines, video channels, etc.).</i> > <i>Memberships (gym, clubs, etc)</i> > <i>Services (Cleaners, Pest Control, Lawn Care, etc.)</i> | |
| | Finances | Keep track of ALL expenses, monies, and accounts | |
| 7 | Social Security Administration | Notify them of the death and inquire about Survivor's Benefits if there are any dependents. | |
| 8 | File Taxes | | |
| 9 | Employer | Notify employer of death and inquire about any pending wages, life insurance benefits, retirement plans, etc. | |
| 10 | Mail | Locate and close any post office boxes. Notify Post Office of the death and give a forwarding address for all mail. This must be done for each property that is a part of the estate. | |
| 11 | Electronic Data & Security | Locate any passwords, electronic devices, & social media accounts. | |
| 12 | Take Inventory & Secure Valuables | Take a detailed inventory of all property with clear descriptions and pictures, when possible. > <i>Real Estate.</i> > <i>Personal Property.</i> > <i>Vehicles.</i> > <i>Weapons</i> > <i>Jewelry.</i> > <i>Collectibles & Antiques</i> | |
| 13 | Pets | Re-home any pets. Be sure to take any familiar toys, blankets, bedding, food and medications. If known, share vaccine and vet information. | |
| 14 | Prepare property(ies) for Vacancy | See vacancy check list.... | |