



## Checklist for When a Person Dies

- Find and review Decedent's expressed funeral and burial wishes.
- Plan and arrange for funeral.
- Work with funeral director to order death certificates.
- Evaluate need for security at Decedent's residence.
- Cancel or rearrange home deliveries.
- Have Post Office hold or forward mail.
- Find perishable property (food, plants, etc.), arrange for care or disposal.
- Notify agent under any power of attorney.
- Prepare and arrange for obituary.
- Arrange for mortuary, cemetery, burial, cremation, as appropriate.
- Keep records of all payments for funeral and other expenses.
- Locate safe deposit box(es).
- Locate wills, codicils, trusts.
- Locate life insurance policies.
- Locate other important documents, accounts, investments, etc.
- Advise Social Security, Medicaid, other agencies as appropriate (creditors, utilities, homeowner's insurance, car insurance).
- Investigate social security benefits.
- Investigate life insurance.
- Investigate union death benefits.
- Investigate veterans burial allowance and other benefits.

- Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements.
- Investigate refunds on insurance or canceled subscriptions.
- Investigate Keogh and IRA accounts.
- Investigate business, partnership and investment arrangements.
- Retain and meet with attorney regarding estate matters. Request the Probate Checklist on our site for a list of What to bring to first conference with the attorney.
- Retain and meet with CPA as to tax and accounting matters.
- Meet with life insurance agent to collect proceeds or consider options.
- Deal with fire, theft, liability and auto insurance on Decedent's property.
- Work with attorney and CPA to prepare inventory, list of accounts and list of debts.
- Review credit cards and charge accounts, cancel as appropriate.
- DO NOT pay any of Decedent's debts until attorney discusses with family or executor
- Obtain valuations of assets, as appropriate.
- If Trust is involved, arrange for any allocations and transfers.
- Arrange for final income tax return and estate tax return, as necessary.