

# CHECKLIST

## What to do after the death of a loved one

- Make arrangements for children & pets
- Secure property (homes, auto)
- Inform family & friends
- Check for funeral/estate plans
- Get legal pronouncement of death (at least 10 copies for various legal needs)
- File life insurance claim
- Plan funeral/burial
- Write an obituary
- Notify employers/check for pensions (contact companies)
- Find will & executor, take will to probate
- Meet with trusts/estates attorney
- Contact CPA about final tax return for deceased
- Make a list of bills: pay & close out accounts (credit cards)
- Forward mail
- Close/forward email accounts
- Check for unclaimed property for deceased
- Check for passwords for accounts, electronics, etc.
  - Delete or memorialize social media accounts
- Inventory/track down assets
- Clean out home
  - Turn off/check power/utilities
  - Contact lawn, maid, security services
- If renter, contact landlord, utilities
- Cancel subscriptions, memberships, & services
  - Newspapers
  - Cable
  - Streaming services
  - Internet
  - Phone
  - Gym
  - Apps (mobile, online)
  - Video games
  - Computer (antivirus, etc.)
  - Professional & social organizations
- Contact important agencies
  - Social Security Administration
  - Credit Bureaus (all 3)
  - Banks, stockbrokers
  - Mortgage companies
  - Insurance companies
  - DMV, voter registration
- Contact your financial advisor about changes that must be made to your own accounts, filings, etc.