



# Dennett, Craig and Pate

## What to do when a loved one dies

A survivor's checklist

### IMMEDIATELY FOLLOWING THE DEATH, YOU SHOULD:

- 1. Contact the funeral home to take your loved one into their care.
- 2. Contact your minister.
- 3. Alert immediate family members and close friends.
- 4. If employed, contact the deceased's employer.
- 5. If applicable, notify agent under Power of Attorney.
- 6. Alert the executor of your loved one's Will.
- 7. Notify religious, fraternal, and civic organizations that your loved one was a member of.
- 8. Notify your attorney regarding the probate of the estate.
- 9. Arrange for the care of any dependents.
- 10. If the deceased had any pets, arrange for their immediate care.
- 11. Remove any valuables from the deceased's home, secure the residence, and take steps to make the home appear to be occupied (for example, use of lamp timers).
- 12. Arrange for the disposal of any perishables left in the deceased's home- such as food, refrigerated items, and existing refuse.
- 13. Alert the Post Office to forward the deceased's mail.
- 14. Locate loved one's important documents:
  - Will
  - Birth certificate
  - Social Security card
  - Marriage license
  - Military discharge papers (DD-214)
  - Deed to burial property
  - Copy of funeral prearrangements
  - Life insurance policies

- 15. File any outstanding claims for health insurance or Medicare
- 16. Obtain copies of deceased's outstanding bills.
- 17. Locate and/or obtain other important paperwork of the necessary for the settlement of their estate:
  - At least 12 copies of the certified Death Certificates
  
  - Real estate deeds and titles
  - Stock certificates
  - Real estate titles
  - Loan paperwork
  - Bank and retirement account statements
  - Last 4 years of tax returns
- 18. Advise all creditors in writing that a death has occurred.
- 19. Change ownership of assets and lines of credit.
- 20. Update your Will.
- 21. Update beneficiaries on your life insurance policies, if necessary.
- 22. Send acknowledgement cards for flowers, donations, food, kindness. Also remember to thank pallbearers.
- 23. Organize and distribute decedent's personal belongings.
- 24. Remove loved one's from marketing and mailing lists.