

Checklist: Things to Do When a Person Dies

Place an "L" in the left column if Lawyer is to handle
 Place an "X" in the left column when item has been completed
 Place an "N/A" in the left column if item is not applicable

	Notify family and close friends
	Secure Decedent's Residence
	Prepare obituary
	Arrange for mortuary, cemetery, burial, or cremation, as appropriate
	Find and review Decedent's expressed funeral and burial wishes, if any
	Arrange funeral/burial services
	Keep records of all payments for funeral and other expenses
	Locate wills, codicils, trusts
	Locate life insurance policies
	Locate other important documents, relationships, accounts, investments, etc.
	Locate safe deposit box(es); follow safe deposit box procedures
	Retain and meet with attorney regarding estate matters
	Retain and meet with CPA as to tax and accounting matters
	Have Post Office hold mail or redirect mail to Personal Representative
	Notify and/all Personal Representatives
	Obtain information about Social Security benefits (death and/or burial)
	Obtain information about Life Insurance Policies

	Obtain information about business, partnership, and investment arrangements
	Meet with life insurance agent to collect proceeds or consider options
	Obtain Death Certificates (get 10 - 12)
	Deal with fire, theft, liability, and auto insurance on Decedent's property
	Work with attorney and CPA to prepare inventory, list of accounts, 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 involved, arrange for any allocations and transfers
	Arrange for final income tax return and estate tax return, as necessary