



## **Checklist: What to do When a Loved One Dies:**

*By: Attorney Tony Ezzi*

\*Some of these items should be planned for ahead of time, that is what an Estate Plan is for.

<input type="checkbox"/>	1. Arrange for Organ Donation if applicable;
<input type="checkbox"/>	2. Notify family members and loved ones of the passing;
<input type="checkbox"/>	3. Make Funeral arrangements (determine if pre-paid or not);
<input type="checkbox"/>	4. Prepare an Obituary;
<input type="checkbox"/>	5. Obtain several original Death Certificates (within 10 after death, usually from a funeral home);
<input type="checkbox"/>	6. Notify Social Security, Medicaid, Medicare and any other public assistance or aid providers;
<input type="checkbox"/>	7. Notify Employer and past Employers if applicable;
<input type="checkbox"/>	8. Notify Veterans Affairs if applicable;
<input type="checkbox"/>	9. Notify the Post Office (give forwarding information);
<input type="checkbox"/>	10. Locate important paperwork within the home or elsewhere: <ul style="list-style-type: none"><li>a. If there is a Will, file within 30 days of death with the County Clerk's Office;</li><li>b. Determine if there is a Trust or not;</li><li>c. Power of Attorney ends at the time of death of your loved one;</li><li>d. Life Insurance should be notified and beneficiaries determined;</li><li>e. Retirement Benefits/Pension etc., notify and determine beneficiaries;</li><li>f. Bank and financial accounts, stocks/bonds/annuities, other investments;</li><li>g. Debts including Credit Card debt and other loans;</li><li>h. Real Property information like the Deed, promissory notes and loans;</li><li>i. Personal Property should be organized and sorted;</li><li>j. Titles to motor vehicles (make sure the vehicles are insured)</li><li>k. Safety Deposit box;</li></ul>
<input type="checkbox"/>	11. Cancel or transfer services, utilities and continuing expenses;
<input type="checkbox"/>	12. Secure all Real Property and Vehicles against theft or misuse;
<input type="checkbox"/>	13. Contact a Probate Lawyer to determine if court is required (Probate); <ul style="list-style-type: none"><li>a. Small-Estates may not need to go through Probate;</li><li>b. The transfer or sale of Real Property generally requires Probate;</li><li>c. An Executor (named in the Will) or Administrator (if there is no Will) are in charge of administering the Estate of the loved one, determining all debts;</li><li>d. Personal Property that was previously organized and sorted are to be either distributed or sold according to the Will or by Statute;</li></ul>
<input type="checkbox"/>	14. Work with your Accountant/Tax Preparer to arrange Final Taxes;
<input type="checkbox"/>	15. Deactivate all online accounts and/or email and phone accounts;

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