



WHAT TO DO WHEN A PERSON DIES

1. Find and review decedent's expressed wishes for funeral and final disposition.
2. Find perishable property (food, plants, etc), arrange for care or disposal. Arrange for care of pets.
3. Notify agent under any power of attorney.
4. Prepare and arrange for obituary.
5. Plan and arrange for funeral and final disposition.
6. Work with funeral director to order death certificates.
7. Keep records of all payments for funeral and other expenses.
8. Locate original wills, codicils, trust and marital agreements and bring them to your attorney.
9. Locate safe deposit box(es).
10. Evaluate the need for security at decedent's residence and other property; maintain insurance, if appropriate.
11. Have post office hold or forward mail.
12. Cancel or rearrange home deliveries, magazine and newspaper subscriptions, automatic payments, credit cards, charge accounts, telephone, cable or internet services, as appropriate.
13. Advise Social Security, Medicaid, and other agencies as appropriate (creditors, utilities, homeowner's and car insurance, pension plans).
14. Locate life insurance policies.

15. Locate recent bank and other financial statements.
16. Investigate social security benefits.
17. Investigate veterans burial allowance and other benefits.
18. Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements.
19. Investigate refunds on insurance or canceled subscriptions.
20. Investigate business, partnership and investment arrangements.
21. Make an appointment to meet with your attorney for advice regarding administration of the estate.
22. Meet with a CPA or tax expert to arrange for final income tax returns, fiduciary tax returns and estate tax return, as necessary, and for post-mortem tax planning advice.
23. **DO NOT** pay any of decedent's debts until discussed with an attorney.

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