To Do List | When Someone Dies

Determine who has authority to make the final arrangements!

1. Call next of kin, other family members, close friends and **employer.**
2. If appropriate, contact Pastor/Rabbi.
3. Call Mortuary to set up appointment.
4. Visit mortuary with at least one other person, to make arrangements. (Wishes arerecorded in Exit Strategies. If family is coming from long distances, consider theirneeds in making plans. If the deceased was a veteran, take original discharge papers. Order **certified copies** of the death certificates.
5. If burial or internment is chosen, call and visit the cemetery. (Do not go alone; again, take a trusted family member or friend with you. If you are uncomfortable orfeel pressured, do not sign anything immediately, but discuss it away from the facility.)
6. Notify friends, neighbors and social groups.
7. Concurrently with the above: Notify Attorney to review the following issueswith him/her:
   Attorney name and Telephone #: (   ) ______________________________
   - □ **All legal and financial issues (wills, trusts, bank accounts, etc.)**
   - □ Notify landlord – check to see how much notice will be necessary prior to vacating premises. Allow time to process loss and handle moving of belongings.
   - □ Bank – obtain access to safety deposit box if one exists. Set up a proper estate administration bank account upon advice of the attorney.
   - □ Contact Accountant.
   - □ Contact Pension.
   - □ Contact Social Security.
   - □ Contact Life Insurance.
   - □ Contact brokerage firms and investment companies.
   - □ Cancel credit cards of deceased
   - □ Insurance: Cancel insurance **upon sale of car**, and renters/home owners insurance **when space is officially vacated or sold**.
   - □ Cancel group and publication memberships (check to see if any benefits are available prior to canceling).

Call a Professional Estate Organizer in your area for assistance.