

## **Things to do when a person dies:**

1. Notify immediate family and close friends.
2. Evaluate the emotional impact on the family and arrange for support.
3. Arrange care for dependents, if any.
4. Notify attending physician or coroner.
5. Arrange care for pets, if any.
6. Evaluate the need for security at Decedent's residence (change the locks!).
7. Cancel automatic payments from decedent's bank account.
8. Have Post Office forward mail to trustee/executor's address.
9. Find perishable property (food, plants, etc) arrange for care or disposal.
10. Find & review Decedent's expressed funeral and burial wishes (who is agent for AHCD?).
11. Notify agent under any power of attorney.
12. Prepare and arrange for obituary (work with agent for ADHD).
13. Arrange for mortuary, cemetery, burial cremation, as appropriate (work with agent for AHCD).
14. Arrange funeral/burial services (work with agent for AHCD).
15. Keep records of all payments for funeral and other personal expenses.
16. Locate safety deposit box, wills, codicils, trusts, and all legal documents.
17. Locate & investigate life insurance policies, brokerage accounts, etc.
18. Investigate Social Security benefits (burial expenses of \$250), Medi-Cal, other.
19. Investigate employment accrued vacation, final wages, retirement plans, deferred compensation, medical reimbursements or union death benefits.
21. Investigate veteran's burial allowance and other benefits.
22. Investigate fraternal organizations or agencies holding professional licenses of decedent.
23. Investigate refunds on insurance or canceled subscriptions (phone, cable, etc).
24. Investigate IRA, Roth IRA, 401K, 403b, 457, Keough accounts (who is the designated beneficiary?).
25. Investigate business, partnership and investment arrangements.
26. Meet & retain an attorney regarding trust administration matters.
27. Meet & retain a CPA as to tax and accounting matters.
28. Meet with life insurance agent to collect proceeds or consider options.

29. Obtain Certified Death Certificates (10 is enough) check with attorney.
30. Deal with fire, theft, liability and auto insurance in Decedent's property.
31. Prepare an inventory, list of accounts and list of debts Executor has a duty to publish notice to creditors.
32. Review credit cards and charge accounts, cancel as appropriate.
33. DO NOT PAY any of Decedent's debts until confirmed with the attorney.
34. Obtain valuations of assets, as appropriate.
35. If trust is involved, arrange for any allocations and transfers.
36. Organize the final income tax return for the decedent.
37. Determine if an estate tax return is necessary (\$11.6 million in 2020, \$23.2 million with portability).
38. Protect & secure personal property - remember not all valuables look valuable.
38. Keep the beneficiaries informed regardless of legal duties to do so.