CHECKLIST
THINGS TO DO WHEN A PERSON DIES

Place an " X " in the left column when item has been completed	
	Notify immediate family and close friends
	Evaluate the emotional impact on the surviving spouse, children and close relatives and friends; arrange for support
	Deal with donation of bodily organs to an "organ bank," as appropriate
	Arrange care for dependents, if any
	Notify attending physician or coroner
	Arrange care for pets, if any
	Evaluate the need for security at Decedent's residence
	Cancel or rearrange home deliveries?
	Have Post Office hold mail?
	Find perishable property (food, plants, etc.), arrange for care or disposal
	Find and review Decedent's expressed funeral and burial wishes
	Notify agent under any power of attorney
	Prepare and arrange for obituary
	Arrange for mortuary, cemetery, burial, cremation, as appropriate
	Arrange funeral/burial services
	Notify other members of family and friends
	Keep records of all payments for funeral and other expenses
	Locate safe deposit box(es);
	Locate wills, codicils, trusts
	Locate life insurance policies
	Locate other important documents, relationships, accounts, investments, etc.
	Advise Social Security
	Investigate social security benefits
	Investigate life insurance
	Investigate union death benefits
	Investigate veterans burial allowance and other benefits
	Investigate fraternal organizations

Place an " X " in the left column when item has been completed	
	Investigate employee benefits, including accrued vacation pay, death benefits, final wages, retirement plans, deferred compensation, medical reimbursements,
	Investigate refunds on insurance or canceled subscriptions
	Investigate Keogh and IRA accounts
	Investigate business, partnership and investment arrangements
	Retain and meet with attorney regarding estate matters
	Retain and meet with CPA as to tax and accounting matters
	Meet with life insurance agent to collect proceeds or consider options
	Obtain death certificates (ask attorney how many are needed)
	Deal with fire, theft, liability and auto insurance on Decedent's property
	Work with attorney and CPA to prepare inventory, list of accounts and 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