Post-Death Basics Checklist

Hereafter Partners

The Next Chapter

When one person dies, those who remain will need guidance on what to do.

1. Use this resource to help guide your loved ones on everything from how you want to be memorialized to how to navigate the files and physical stuff.

2. Revisit this guide when a loved one of yours dies and you need to get a quick handle on what to do first or want to help those who are going through something similar.

Remember

Although friends and family want to be helpful when a loved one dies, many are still in a period of grieving and processing this moment.

The list of post-death tasks can feel overwhelming. Discussing and gathering as many of these items before death as possible will make for an easier road for those left behind.

Day One

The moments after death can be a special time for those gathered. Do not rush them.

Some things that will need to happen on this day are:

- **If the death occurs in a hospital or care facilty or at home under hospice, the death will be pronounced for you. If the death occurs at home, contact the hospice or a local funeral director to have this done.**

Prior to the last moment's of a loved one's life: Be sure to discuss with hospice, hospital staff, or those gathered any important customs or rituals that should be performed at the time of death so that space and time can be reserved for this before the body is removed.

- **Depending on the state in which the death occurred, you may be required to contact a funeral director or coroner to remove the body.**
- **Contact friends and relatives who would like to be alerted to the death.**

Immediate Needs

With a list a mile long, it can be hard to know what is top priority.

Here are the things that will need to be done within the first few days after death:

- **Find the will and/or contact the lawyer and make sure the executor is contacted so that the will can be reviewed.**
- **Check any files for any instructions that the loved one may have left for actions to be taken after death.**
- **Order death certificates. In most states, a member of the deceased's immediate family (spouse, sibling, child or parent), the executor, or a funeral director can obtain these. Having five or so on hand soon after the death will make the next steps much easier.**
- **Make arrangements any desired memorial event or acknowledgement.**

These tasks do not need to fall to one person. Read on to find out one way to distribute the load.

The Role of the Executor

If the loved one had an attorney, this person should be among the first person called after the initial arrangements have been settled.

The attorney will explain to the executor all the various things that will need to be done. They will typically provide a state-specific checklist and will take primary responsibility for seeing that these tasks are accomplished. These include, but are not limited to:

- **Review the Last Will & Testament, particularly the sections dealing with beneficiaries and the distribution of property**
- **Notify insurance companies and financial institutions of the death.**
- **Prepare an inventory of all of the assets in the Estate**
- **Review and pay all bills**
- **File income tax returns and estate tax forms and pay taxes**
- **Distribute personal effects and other assets**

List of Entities to be Notified

A number of entitites must be notified of a person's death. Usually, the exectuor must do this with death certificate and social security number in hand, whether in person or—through the aid of a notary—through the mail or online. Start with a phone call to the following:

- Social Security
- Landlord, Assisted Living, or Nursing Home
- Insurance companies
- Pension and employee benefits offices (including Veterans' Affairs, particularly if burial is a question)

TIP: At the same time as contacting these entities, be sure to apply for survivor benefits to anyone entitled to them.

- Banks, credit card companies, and investment firms
- Department of Motor Vehicles
- Post office (forwarding mail to the executor or other designee)

Roles for Other Loved Ones

The executor will be in charge of handling many of the legal and financial aspects of the post-death period. But there are more than enough items on the immediate to-do list to share with other loved ones of the person who just died.

1. Use the loved ones’ planning notes to plan a memorial event (see "Memorial Planning" page).
2. Contact friends and families to let them know of the death, invite any remembrances to share with the family, and notify of plans for a memorial.
3. Write/edit the obituary and submit to publication outlets.

Taking care of any pets and plants left behind—per the wishes of the deceased—is a great task for friends and family who wish to be helpful.

Longer Term Help

After the initial flurry of activity, other tasks emerge, but not all need to be taken on by the executor. Consider having a meeting of family and friends to determine how they are best suited to help. Here are a few examples:

- **The family historian may delight in going through old photos and documents, paring down, scanning, and sharing**

- **The organizational maven may devise a process for figuring out who can use what items and how and where others can be donated, recycled, or discarded**

- **While the executor should handle bills and official statements, nearly anyone with a little time can call companies and organization to remove the deceased from mailing lists**

The Checklists

1. Immediate Tasks

2. Short-Term Tasks

3. Longer-Term Tasks

Immediate Tasks

Post-Death Checklist

TASK	EX	OTH
Contact coroner or funeral director for death pronouncement and body removal and plan for body disposition per deceased's wishes		
Contact friends and relatives who would wish to be notified		
Find the will and contact lawyer, make sure executor is contacted, and check files for any instructions left by deceased for actions to take		
Order death certificates, multiple copies		
Locate car keys, garage openers, gate codes, location of extra keys and secure all personal property		
Check for any imminent bills due and pay		
Make arrangements for desired memorial service or acknowledgement		
Take care of pets and/or plants per the deceased's desires		

Short-Term Tasks

Post-Death Checklist

TASK	EX	OTH
Write/edit the obituary and submit to publication outlets		
Contact friends and families to let them know of the death, invite any remembrances to share with the family, and notify of plans for a memorial		
Use the loved ones' planning notes to plan desired memorial event or acknowledgement		
Notify Social Security office, insurance companies, pension and employee benefits of death and apply for benefits for beneficiaries		
Gather all items of "Need to Know Checklist" and any list from lawyer, to assist in carrying out Executor's duties		
Notify financial institutions/financial planner/accountant and confirm balances and outstanding debts to pay		
Check for automatic recurring payments and determine whether these need to be changed		
Meet with family members and other loved ones to plan a role for them in post-death tasks		

Longer-Term Tasks

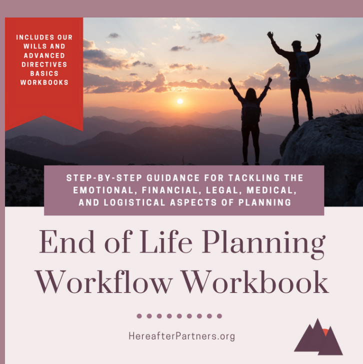
Post-Death Checklist

TASK	EX	OTH
Prepare an inventory of all the assets of the estate		
Review and pay all bills		
File income tax returns and estate tax forms and pay taxes		
Distribute personal effects and other assets per the last will and testament		
Find organizations and individuals willing to take remaining personal effects and distribute, recycle, or discard		

Just the beginning

Hopefully, this guide has provided you with practical ideas for one aspect of End of Life planning.

Check out our other downloadable resources at **www.hereafterpartners.org**.



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