

Top 10

What to Do After a Death

In the difficult time immediately following a death, the list of things that needs to be done can feel overwhelming. Start here with these 10 most important items.

- 1 Notify** family members, business partners, employer--anyone to whom the deceased person had some type of responsibility. Are there any children, a spouse, elderly or disabled dependents (or pets) who need immediate assistance?

- 2 Freeze** and inventory the tangible and intangible assets so that nothing goes off property--cars, house, 401k and other retirement funds, jewelry, keepsakes, etc. Consider changing the locks so that you know who has access to the house.

- 3 Look** for a will and other legal documents for probate (a family trust, for example). If the will does not stipulate (or if there is no will), identify who will act as executor or administrator.

- 4 Place** an announcement or obituary in local and hometown newspapers.

- 5 Plan** the funeral service and don't be afraid to shop on price, because they vary widely! Request a price list from all service providers and ask that they break out individual costs for "packages."

- 6 Request** extra copies of the death certificate. Whatever number you think you need, add at least 5 or 10 to that.

- 7 Talk** to a probate specialist to determine if there are particularly complicated legal and tax issues for the estate.

- 8 Identify** what bills and debts exist. Utilities, credit cards, insurance, mortgages and other monthly bills must be paid, or contacted about extensions. Check credit card statements for ongoing monthly charges.

- 9 Contact** social media, email providers and cellphone companies to shut down digital accounts. Google the deceased's name to check their digital footprint--you may find additional accounts, organizations or people to notify.

- 10 Choose** the best go-to people around you for emotional and logistical assistance. Build a strong team for getting things done and for making sure you get the support you need.

We provide our DIY information as a service to families settling estates or helping with a family member's transition to assisted living. If your project requires a physical transition or estate cleanout, give us a call anytime for a free consultation: (800) 913-7747.