CHECKLIST OF 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
	Deal with donation of body 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 Postal Service hold mail or forward to Executor
	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 or 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); follow safe deposit box procedures
	Locate wills, codicils, trusts
	Retain and meet with attorney regarding estate matters
	Retain and meet with CPA as to tax and accounting matters
	Obtain death certificates (ask attorney how many are needed)
	Locate life insurance policies
	Locate other important documents, bank, investment account and credit card statements
	Advise Social Security, Medicare, other agencies as appropriate
	Investigate social security benefits
	Investigate life insurance
	Investigate union death benefits
	Investigate veterans' burial allowance and other benefits
	Investigate fraternal organizations
	Investigate employee benefits, including accrued vacation pay, death benefits, final wages,retirement plans, deferred compensation, medical reimbursements
	Investigate refunds on insurance (car, homeowners, medical) or canceled subscriptions
	Investigate Keogh and IRA accounts
	Investigate business, partnership and investment arrangements
	Meet with life insurance agent to collect proceeds or consider options
	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
	Work with attorney and CPA to prepare final income tax return and estate and/or inheritance tax returns, as necessary
	Review credit cards and charge accounts, cancel as appropriate
	Obtain valuations of assets, as appropriate
	If Trust involved, arrange for any allocations and transfers
	DO NOT pay any of Decedent's debts until attorney discusses with family or Executor

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