

# OAST & HOOK

## CHECKLIST THINGS TO DO WHEN A PERSON DIES

<b>Place an "X" in the left column when the item has been completed</b>	
<input type="checkbox"/>	Notify immediate family and close friends
<input type="checkbox"/>	Evaluate the emotional impact on the surviving spouse, children and close relatives and friends; arrange for support
<input type="checkbox"/>	Deal with donation of bodily organs to an "organ bank," as appropriate
<input type="checkbox"/>	Arrange care for dependents, if any
<input type="checkbox"/>	Notify attending physician
<input type="checkbox"/>	Arrange care for pets, if any
<input type="checkbox"/>	Evaluate the need for security at Decedent's residence
<input type="checkbox"/>	Have Post Office hold mail
<input type="checkbox"/>	Find perishable property (food, plants, etc.), arrange for care or disposal
<input type="checkbox"/>	Find and review Decedent's expressed funeral and burial wishes
<input type="checkbox"/>	Notify agent under any power of attorney
<input type="checkbox"/>	Prepare and arrange for obituary
<input type="checkbox"/>	Arrange for mortuary, cemetery, burial, cremation, as appropriate
<input type="checkbox"/>	Notify other members of family and friends
<input type="checkbox"/>	Keep records of all payments for funeral and other expenses
<input type="checkbox"/>	Locate safe deposit box (es); follow safe deposit box procedures
<input type="checkbox"/>	Locate wills, codicils, trusts
<input type="checkbox"/>	Locate life insurance policies
<input type="checkbox"/>	Locate income tax returns for last 3 years
<input type="checkbox"/>	Locate gift tax returns, if any
<input type="checkbox"/>	Locate other important documents, relationships, accounts, investments, etc.
<input type="checkbox"/>	Advise Social Security and other agencies as appropriate
<input type="checkbox"/>	Investigate social security benefits

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	Investigate veterans burial allowance and other benefits
	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, including Designations of Beneficiary
	Investigate business, partnership and investment arrangements
	Retain and meet with an Elder Law attorney regarding estate administration, tax and accounting matters
	Obtain death certificates (ask attorney how many are needed)
	Deal with fire, theft, liability and auto insurance on Decedent's property
	Work with an attorney 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