

1. Notify doctors, clergy or religious representatives, family, friends, and business associates as appropriate (delegate to family members if appropriate)
2. Notify a hospital for anatomical gifts (organ or tissue donation)
3. Notify funeral home and make funeral/burial arrangements including: if decedent was a veteran, take military papers, determine if a memorial is to be suggested in lieu of flowers, and the place and manner of internment (delegate to family members if appropriate)
4. Assemble personal data for death certificates and check against vital records such as birth certificates, social security cards, etc.
5. Draft obituary and send to newspaper including date, time, and location of funeral or memorial service
6. Obtain death certificates
7. Secure tangible property (inventory them and store safely)
8. Secure real property (consider changing locks if property is unoccupied)
9. Keep utilities such as gas, water, and electricity on
10. Locate any original estate planning documents (will and trust, if applicable)
11. Gather personal records, including checkbooks, statements, stocks certificates, copies of income tax returns and begin preparation of asset and liability lists
12. Record all income and expenses for the estate or trust and keep a time log for yourself (This will be important if you receive compensation for your work or if there is an estate tax return required.)
13. Check that there is insurance on real and tangible property (including vehicles) and keep it in place
14. Cancel credit cards and ask for any death benefits
15. Cancel newspaper and magazine subscriptions and ask for refunds if applicable
16. Forward mail to the appropriate person
17. Notify social security and veterans administrations (if applicable) of death and check for benefits (any social security paid in month of death will be pulled back by SSA)
18. Check for safe deposit box and inventory contents in the presence of a bank officer
19. Contact anyone owing money to decedent and arrange for continued collection
20. For questions regarding children, pets, or anything not included on this list, please contact one of our attorneys for advice. The care and well-being of children and pets is priority.