



GOODMANLAWSM

Advice, Assistance, Alacrity



www.goodmanlaw.com

info@goodmanlaw.com

THINGS TO DO AFTER THE DEATH OF A LOVED ONE

Within first 24 hours:

1. Determine whether any of decedent's property needs to be safeguarded, such as a motor vehicle, vacant house, etc.
2. Ensure that proper funeral arrangements have been made.

Within two weeks:

3. Locate the decedent's letter of instruction, if any.
4. Locate the original Will and read it.
5. Locate important records such as titles, deeds and life insurance policies.
6. Make appointment with an attorney to discuss estate.
7. Notify life insurance company(ies) of the death and request claim(s) forms.
8. If mortgage insurance on home exists, notify insurance company of death.
9. Determine if any bills must be paid immediately.
10. Contact creditors who are demanding immediate payment and notify creditor of death.
11. Notify credit card companies of death.
12. Cancel credit cards on which decedent was the only signer.
13. Obtain bill for last illness from hospital.
14. Order at least six (6) death certificates from the funeral home.
15. Contact Post Office to make any necessary changes in delivery of mail.

Within one month:

16. Notify Social Security of the death, and any other organization paying on retirement or paying an annuity upon death.
17. Gather together and organize financial documents:
 - a. Bank accounts owned by decedent.
 - b. Mutual funds owned by decedent.
 - c. Brokerage accounts owned by decedent.
 - d. Certificates of Deposit in decedent's name.
 - e. Stock Certificates registered in decedent's name.
 - f. Any promissory notes under which decedent was entitled to receive payment.
 - g. Titles to Motor Vehicles and/or Mobile Homes that are listed in decedent's name.
 - h. Deeds to real property owned by decedent.
 - i. Any appraisals of jewelry or other valuable personal property owned by decedent.
18. Gain access to and inventory any safe deposit box.
19. Obtain the account balance on mortgages, loans, checking and savings accounts as of the date of death.
20. Bring original Will, financial documents, balances, death certificates, and inventory of safe deposit box to meeting with attorney.
21. Notify CPA, accountant or bookkeeper of the death.

Within two to six months:

22. If automobiles are held in joint tenancy, change motor vehicle titles to reflect ownership only by the surviving joint tenant.
23. If stocks or bonds are held in joint tenancy, contact stockbroker to change records to reflect ownership only by the surviving joint tenant.