

THE FIRST THINGS TO DO AFTER THE DEATH OF A LOVED ONE

Check the safety deposit box, if there is one and you can gain access

Get the mail forwarded

Notify all the utility companies, cable TV, etc.

Call social security (to cancel benefits)

Call the employer (to stop pension checks or to find out how to collect employee benefits such as life insurance)

Check whether the insurance is current (on real estate, autos, a family business or personal property). ****Important:** verify whether the homeowners insurance will cover a claim on home that is unoccupied – many do not

Check credit cards (to see if they should be changed or canceled)

Contact the life insurance company, if any, and get the forms to collect on the policy

Contact all financial advisors (financial planner, cpa, etc.) to see if there are other documents they will need in order to complete their duties

Store or otherwise secure personal items, important papers, vehicles

Winterize vehicles, vacation homes or cottages

Keep track of the time you spend handling these details

Keep a check register or other ledger of bills you've paid with your own funds

Collect bank statements, tax documents and other important notices

Start a list of creditors that need to be paid

Review the estate planning documents, if any, or get legal advice about what the documents actually say

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