

Published on *SeniorNavigator* (<https://seniornavigator.org>)

## Top 10 Things to Do: Checklist for a Death In the Family

The days immediately after someone in the family dies are a confusing blend of raw emotion and crisp paperwork. It's a time when your brain reverts back to basics, reacting on an emotional "fight or flight" level. And yet, people expect you to process important documents and make critical estate decisions – actions which require a fully functioning frontal lobe.

We have you covered with this checklist we developed for our clients to use after a death in the family. Our checklist will get you started with the 10 most important things you should focus on. Some of these tasks will likely grow into their own checklists, but don't worry about that yet. Just work your way down this preliminary checklist to help keep your brain on track.

### **Checklist for a Death in the Family**

- **Who needs to be notified?** Family members, business partners, employer – anyone to whom the deceased person had some type of responsibility. Are there any children, a spouse, elderly or disabled dependents (or pets) who need immediate assistance?
- **Freeze and inventory the tangible and intangible assets so that nothing goes off property** – cars, house, 401k and other retirement funds, jewelry, keepsakes, etc. List as many things as you can in writing so that there is a record. And consider changing the locks so that you know who has access to the house.
- **Look for a will and other legal documents for probate** (a family trust, for example). If the will does not stipulate (or if there is no will) identify who will act as executor or administrator.
- Place an announcement or obituary in local and hometown newspapers.
- Plan the funeral service, and **don't be afraid to shop on price because they vary widely!** Request a price list from all service providers, and ask that

they break out individual costs for “packages.” You have the right to a la carte pricing for everything a funeral home provides – it’s law, actually.

- **Request extra copies of the death certificate**, and whatever number you think you need, add at least 5 or 10 to that.
- Talk to a probate expert to identify legal and tax issues for the estate.
- Identify what bills and debts exist. **Utilities, credit cards, insurance, mortgages and other monthly bills need to be paid, or contacted about extensions.** Larger debts will eventually need to be settled. Check credit card statements for ongoing monthly charges (like software subscriptions) that need to be notified or canceled.
- **Contact social media**, dating sites, email providers and cell phone companies to shut down digital accounts. Google the deceased’s name to check their digital footprint – you may find additional accounts, organizations or people to notify.
- Choose the best go-to people around you for emotional and logistical assistance. Build a strong team for getting things done, and for making sure you get the support you need.

The days ahead will be a whirlwind of emotions and complicated logistics. Print out a copy of this list to take along and help keep you on track.

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At **WayForth** we work with families in transition due to events such as downsizing, moving to assisted living or the death of a loved one. We can empty an entire house within days, sorting what items to keep, sell, donate, and discard. Our goal is to minimize a family's stress while maximizing the value of the estate. Call us for a free consultation 1-866-616-9708.

Article Source

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Source URL

<https://www.wayforth.com>

Last Reviewed

Thursday, April 1, 2021