What To Do When a Loved One Passes

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MORRIS HALL PLLC
www.morristrust.com

888.222.1328

Place an X in the box to the left when completed.

X	Task	Person Responsible
	Notify immediate family members and friends	
	Notify physician(s)	
	Arrange donation of body or organs, if appropriate	
	Notify clergy	
	Find and review Decedent's expressed funeral or other wishes	
	Review any pre-paid funeral plans; Arrange for cemetery or mortuary	
	Arrange for funeral/burial services	
	Contact Estate Planning Attorney, CPA and/or other professionals who may know where documents are located	
	Locate Trust/Will and other legal documents	
	Locate important papers, including financial records andlife insurance policies	
	Evaluate the need for support for family and friends, including support groups	
	Arrange care for dependents	
	Arrange care for pets	
	Find and dispose of perishable foods	
	Notify agent(s) under any Power of Attorney	
	Contact newspaper about obituary. Due to concerns about identify theft, do not list the month or day of birth in the obituary. Also, if the obituary contains the decedent's address or it is published in the phone book, you may want to consider hiring an off-duty police officer to watch the decedent's house while the family is at the funeral.	
	Locate safe deposit keys. Create inventory of contents of safe deposit box.	
	Determine what property needs to be safeguarded, such as valuable assets, motor vehicles, vacant homes, rental homes, or valuable personal property; Ask who has keys to vehicles or property. Change the locks if appropriate.	
	Notify business associates	
	Obtain death certificates	
	DO NOT give away any assets until you determine it is appropriate or the attorney approves of the transactions	
	DO NOT pay any creditors who are demanding payment until you determine it is appropriate or the attorney approves the transactions	
	Keep accurate records and receipts of all expenses paid on behalf of the deceased (funeral expenses, medical bills, creditors, etc.)	
	Contact insurance agents	
	Notify Social Security, Medicaid and other agencies	
	Notify state motor vehicle department and request they refuse any requests for duplicate licenses to prevent future identity theft.	

Phoenix

Tucson

Mesa

Scottsdale

Arrowhead

Carefree

Prescott

Flagstaff

Albuquerque

Santa Fe

Las Cruces

X	Task	Person Responsible
	Meet with and/or retain an Attorney or other professionals as needed. Bring original Will, Trust, deeds and financial documents showing recent balance and account number, death certificates, and the inventory of safe deposit box to meeting with the estate attorney. Many trusts require allocation of assets among subtrusts which is accounting and legal work. Due to Federal Estate Tax uncertainty at time of death and depending on total assets, you may have to file a DISCLAIMER to minimize taxes. Seek legal counsel for advice.	
	Meet with and/or retain a CPA or other tax professional, as a final income tax return may be needed.	
	Cancel credit cards, if applicable	
	Notify banks and other financial institutions	
	Cancel or provide new address for home deliveries, including newspaper	
	Investigate social security benefits for spouse and dependent children	
	Investigate life insurance	
	Investigate employee benefits	
	Investigate retirement benefits and deferred compensation plans	
	Investigate union and/or veterans benefits	
	Contact U.S. Post Office to have mail forwarded to decedent's Successor Trustee or Personal Representative.	
	Cancel subscriptions and investigate refunds	
	Notify landlord	
	Notify ALTCS and VA if benefits were being received	
	Arrange to have final tax returns prepared	
	Monitor free credit reports from each credit bureau at www.annualcreditreport.com to verify there has been no post-death activity, as a check for identity theft. DO NOT pay any bills for charges that appear to have been incurred as a result of identity theft. Consult with an attorney or the creditor/company. In the event of identity theft, you can minimize the damage by calling the police and other parties, including credit card companies, banks, and the three major credit bureaus (Experian 888-397-3742, Equifax 800-685-1111, and TransUnion 800-680-7289).	

This is not meant to be an exhaustive list of the actions that need to be taken after someone passes away. Its purpose is to provide some guidance to family and friends regarding some important things to remember.

CONCLUSION

The death of a loved one is always a difficult time. Following these guidelines will help relieve some of the stress that might be associated with their passing, as well as allowing family members to grieve their loss.