



RESPONSIBILITY OF SURVIVING RELATIVES CHECKLIST

- Notify police or physician of death depending on circumstances and location of death.

- Notify family, friends, employer and business associates of death.

- Organize funeral or memorial service. Search for any instructions the deceased may have left on his or her desires for the funeral, service or burial location. If no instructions, choose funeral home and burial location. Determine if any of the burial or funeral expenses have been prepaid. If desired, contact clergy member to officiate services.

- Furnish the local papers with an obituary. Include any information the decedent may have indicated prior to death that should be included. List any charitable organizations in which contributions may be made in the name of the decedent.

- Assign someone to record the names of individuals who give flowers or cards, or make charitable contribution in the name of the decedent.

- Obtain several copies of death certificates needed to establish claims for insurance proceeds and other benefits.

- Locate decedents important papers, such as wills, life insurance policies, bank books, etc.

- Inform decedent's attorney of death. Attorney should file the will in probate court. The court will then appoint an executor or personal representative.

- Contact all organizations that the decedent was a member and may be eligible for benefits.

- In some situations, contact trust officer.

- Set up a meeting with the attorney to discuss what steps are necessary to administer the estate. Gather information on your responsibilities and timelines for actions needed.

- Inform creditors of death. Close any credit card accounts.

- Ensure automobile and homeowner's insurance policies remain active during probate process. Modify policies as necessary.

- Contact all benefits' offices, such as employee benefits departments, the Social Security office, the Office of Veterans Affairs (if applicable), life insurance companies, etc. Ascertain your responsibilities to qualify for benefits.

- Contact financial institutions to update registrations on any accounts or investment securities. Remove the decedent's name from any joint accounts.

- Revise existing estate planning documents that may be affected by decedent's death, such as wills or insurance policies, as necessary.

- Revise the title on the decedent's property, such as automobiles or real estate.

- Secure all property for appraisals.

- File appropriate federal and state estate and inheritance tax returns.

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