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POST-DEATH INSTRUCTIONS

Immediate Steps

_________ Notify relatives, friends, employer

_________ Begin funeral, memorial, burial arrangements, or contact funeral home, crematory, etc. if plans have already been made

_________ Request Death Certificates from funeral home (5 -10)

Next Steps

Note: Do not contact banks until you have received death certificates and spoken to an attorney

_________Locate Estate Plan Documents (Trusts, amendments, Will, codicils)
_________Contact attorney to begin the trust administration process
_________Contact CPA
_________Contact Financial Advisor
_________Prepare preliminary list of assets

- Bank Accounts
- Brokerage
- Retirement
- Life Insurance
- Real estate
- Business (partnership, corp., LLC) interests
- Cryptocurrency/digital assets
- Safe Deposit Box
- Valuables (coins, jewelry)
- Other (boats, planes, etc.)

_________Pull credit report
_________Cancel health insurance
_________Cancel credit cards
_________Clean residence (remove items from refrigerator, pantry)
_________Cancel non-essential utilities (cable, satellite TV)
_________Arrange for mail to be forwarded to Trustee
_________Arrange for care of pets
_________Change locks on home

These are the preliminary steps you should take when settling a loved one's affairs. Your attorney and other professionals (CPA, Financial Advisor) should advise you on next steps particular to the decedent's circumstances.