



# Initial Checklist After a Loved One Dies

- Care for dependents or pets
- Locate the Deceased's Will so their Executor can be identified, if unknown
- Locate the Deceased's Social Security number
- Call the Person's Employer
- In addition to notifying them on the death, you will also need a contact in their Human Resources department to handle the processing of:
  - The company's 401(k)
  - Group Life Insurance
- If the person lived alone, have mail forwarded to their Executor or a trusted family member
- Contact the three Credit reporting agencies and inform them of the death and to lock down the ability to establish credit in the deceased's name:
  - [www.Equifax.com](http://www.Equifax.com), 1-888-548-7878
  - [www.Transunion.com](http://www.Transunion.com), 1-888-909-8872
  - [www.Experian.com](http://www.Experian.com), 1-888-397-3742
- Search the person's documents to see there is a pre-paid burial plan and/or burial service instructions
- Obtain multiple copies of the Death Certificate
- Begin to monitor the mail for bills that need to be paid and accounts the deceased owns
- Write and submit the obituary
- Clean out the refrigerator, water plants, keep some lights on
- Contact the local police department and ask them to increase drive bys
- Stop newspaper delivery, automatic prescription refills and any other automatic deliveries
- After the more immediate details are taken care of:
  - Take the Will to the appropriate county or city office for probate
  - If necessary, open a bank account for the deceased's estate
- Contact professionals the deceased worked with:
  - CPA
  - Estate Planning Attorney
  - Financial Advisor