

STEPS TO TAKE UPON A DEATH

1. Look for written funeral and burial instructions. These may be with the attorney or financial advisor.
2. Arrange for funeral and burial.
3. Secure the property (if vacant):
 - a. Have a friend or neighbor watch the home, check telephone messages, collect mail, throw out food, water plants;
 - b. Contact the local police for periodic house checks;
 - c. Remove valuables but do not distribute yet.
4. Make arrangements for dependents/pets.
5. Contact the Post Office to cancel or forward mail.
6. Collect and arrange for bills to be paid: utility, mortgage or rental, credit cards, insurance, property taxes.
7. Cancel unneeded services: telephone, internet, cable, newspaper.
8. Gather important papers: deeds, titles, insurance policies (life, accident, veterans, employer-provided, health and property).
9. Obtain Death Certificate (usually available from Funeral Home); make a minimum of 12 certified copies – you'll need them.
10. Contact employer and gather employee benefits information.
11. Contact the financial advisor for financial accounts, life insurance, help with retirement accounts (401(k)/IRA) and Social Security.
12. Contact an estate attorney for help with arranging for probate (filing the will and estate administration) and filing the estate tax return.
13. Contact the accountant for the final income tax return, if applicable.
14. If needed, open a bank account for the estate.

IMPORTANT

REMEMBER TO TAKE TIME FOR YOURSELF – NOT EVERYTHING MUST BE DONE AT ONCE

WE AT PRW ARE HERE TO HELP