

Losing a loved one is incredibly difficult. While many decisions can wait, there are a few important steps that may need attention in the days following their passing.



TAKE TIME FOR YOURSELF AND YOUR FAMILY

- ☐ **Lean on family, friends, and your support network** during this difficult time.
- ☐ **Remember that many financial and legal matters** can be addressed later.



TAKE CARE OF IMMEDIATE ARRANGEMENTS

- ☐ **Contact a funeral home** or memorial service provider to begin making arrangements.
- ☐ **Locate any funeral or burial instructions**, if your loved one documented their wishes in advance.



OBTAIN OFFICIAL DOCUMENTATION

- ☐ **Request 10+ certified copies of the death certificate**, which will be needed when notifying financial institutions and transferring accounts.
- ☐ **Locate important identifying information**, such as Social Security number, date of birth, and place of birth.



SECURE PROPERTY AND IMPORTANT ITEMS

- ☐ **Ensure the home, vehicles, and other property are secure**, including any safes or storage units.
- ☐ **Locate important documents**, such as wills, trusts, insurance policies, and financial account information.



NOTIFY KEY ORGANIZATIONS



- ☐ **Confirm that the Social Security Administration has been notified** and ask about any remaining benefit payments.
- ☐ **Inform your loved one's employer**, if they were still working.
- ☐ **Contact life insurance companies to begin the claims process**, if applicable.



COORDINATE WITH TRUSTED ADVISORS

- ☐ **Locate contact information for and notify your loved one's financial advisor, attorney, and tax professional**, if applicable.
- ☐ **Identify the executor or personal representative** responsible for managing the estate.



KEEP RECORDS

- ☐ **Document important conversations and steps taken**, including institutions contacted and next steps.

 This to-do item may be higher priority or more time-sensitive than others.