What to Do When Someone Dies

NAME _____ DATE OF DEATH _____

EXECUTOR _____

FIRST DAYS

- [ ] Get several certified copies of the death certificate
- [ ] Arrange the funeral or memorial
- [ ] Tell close family and friends
- [ ] Secure their home, car and valuables
- [ ] Look after pets and plants
- [ ] Ask someone to help with calls and meals
- [ ]
- [ ]

NEXT WEEKS

- [ ] Find the will and contact the executor or an estate attorney
- [ ] Notify Social Security (the funeral home may do this)
- [ ] Contact their employer about final pay and benefits
- [ ] Notify banks and insurance companies
- [ ] Ask USPS to forward mail
- [ ] Notify the credit bureaus
- [ ] Cancel subscriptions, phone and utilities
- [ ] Close social media or set up a memorial
- [ ] Keep receipts for funeral and estate costs
- [ ]
- [ ]

LATER

- [ ] File their final tax return (ask a tax professional)
- [ ] Close remaining accounts
- [ ] Distribute belongings
- [ ] Keep copies of every document for your records
- [ ]
- [ ]

Rules vary by state. An estate attorney or the funeral home can help with many of these steps.