

IMMEDIATELY FOLLOWING THE DEATH

- CONTACT FUNERAL HOME
- CONTACT YOUR CLERGY
- ALERT FAMILY, CLOSE FRIENDS, & EMPLOYER
- ALERT EXECUTOR OF YOUR LOVED ONE'S WILL
- NOTIFY ANY ORGANIZATIONS YOUR LOVED ONE WAS INVOLVED IN
- NOTIFY ATTORNEY ABOUT PROBATE OF THE ESTATE
- ARRANGE FOR CARE OF DEPENDENTS
- ARRANGE FOR CARE OF LIVESTOCK OR PETS
- LOCATE LOVED ONE'S IMPORTANT DOCUMENTS (SEE BELOW)
- COMPILE INFORMATION NEEDED FOR DEATH CERTIFICATE (SEE BELOW)

ONE MONTH FOLLOWING THE DEATH

- CONSULT WITH ATTORNEY ABOUT PROBATE
- MEET WITH ACCOUNTANT TO DISCUSS ESTATE TAXES
- FILE LIFE INSURANCE CLAIMS
- CONTACT SOCIAL SECURITY AND OTHER GOVERNMENT OFFICES THAT MAY HAVE BEEN MAKING PAYMENTS TO THE DECEASED
- NOTIFY THE REGISTRAR OF VOTERS
- IF THE DECEASED'S HOME IS UNOCCUPIED, CANCEL UNNECESSARY SERVICES
- CANCEL DECEASED'S PRESCRIPTION
- CONTACT DMV TO CANCEL THE DECEASED'S DRIVER'S LICENSE AND TRANSFER VEHICLE REGISTRATION
- IF YOUR LOVED ONE WAS A VETERAN, CONTACT VA TO INQUIRE ABOUT BENEFITS
- CONTACT LOVED ONE'S EMPLOYER TO INQUIRE ABOUT PENSION, 401(K), AND ANY BENEFITS
- NOTIFY ALL THREE CREDIT REPORTING SERVICES
- OBTAIN COPY OF DECEASED'S CREDIT REPORT
- IF DEATH WAS ACCIDENTAL, CHECK FOR WEATHER BENEFITS ON INSURANCE POLICIES
- CHECK FOR LIFE INSURANCE BENEFITS
- FILE HEALTH INSURANCE CLAIMS
- OBTAIN DECEASED'S OUTSTANDING BILLS
- LOCATE PAPERWORK FOR ESTATE SETTLEMENT (SEE BELOW)
- ADVISE CREDITOR THAT A DEATH HAS OCCURED
- CHANGE OWNERSHIP OF ASSETS AND CREDIT LINES
- UPDATE YOUR WILL & BENEFICIARIES OF YOUR LIFE INSURANCE
- SEND ACKNOWLEDGMENT CARDS & THANK PALLBEARERS
- CANCEL SUBSCRIPTIONS, MAILING LISTS, AND SOCIAL MEDIA
- ARRANGE FOR MARKET DISTRIBUTION OF CROPS & LIVESTOCK
- ARRANGE HELP PLANTING/HARVESTING CROPS

IMPORTANT DOCUMENTS

- Will
- Birth Certificate
- Social Security Card
- Marriage License
- Military discharge papers (DD-214)
- Deed (to burial property)

ESTATE DOCUMENTS

- At least 20 copies of the death certificate
- Real Estate deeds and titles
- Stock certificates
- Loan paperwork
- Bank and retirement account statements
- Last 4 years of tax returns

DEATH CERTIFICATE INFORMATION

- Deceased's first, middle, and last name
- Deceased's maiden name
- Deceased's home address
- Deceased's social security number
- Deceased's date of birth
- Deceased's date of death
- Deceased's age
- Deceased's race/ethnicity
- Marital status
- Spouse's first and last name
- Deceased's highest level of education
- Deceased's occupation
- Deceased's place of birth (City and State)
- Deceased's father's name, birth city and state
- Deceased's mother's name, birth city and state
- If deceased is a veteran
 - Entered service date
 - Entered service place
 - Service number
 - Separation date
 - Separation place
 - Grade, Rank or Rating
 - Organization and Branch of Service