

# AFTER THE LOSS

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## QUICK START GUIDE

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Helping Families Handle Affairs with  
Care, Clarity & Compassion

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Superior Legal Solutions, LLC

# AFTER THE LOSS

## QUICK START GUIDE

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What To Do the First Days After a Loss

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Simple • Immediate • First Steps Only

### DISCLAIMER

*I am not an attorney licensed to practice law in Florida and cannot provide legal advice or accept fees for legal advice.*

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**A Resource By**  
**Superior Legal Solutions, LLC**

*Helping Families Handle Affairs With Care, Clarity & Compassion*



# WELCOME

## TO THE AFTER THE LOSS

### QUICK START GUIDE

#### If you are reading this guide,





You may be walking through one of the most difficult moments a family can face.

Please know **you are not alone.**

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This guide was created to provide **calm, simple guidance** during the **first days** after losing a loved one.

#### Inside you will find:

-  **A simple checklist for the first 72 hours**
  -  **Guidance on documents & notifications**
  -  **Emotional support reminders**
  -  **Organization tools to stay on track**
- 

Take this process **one step at a time.** There is no perfect way to navigate loss, but having a **clear path** can make the journey a little easier.

*With care,*

**SHALONDA GUNN**

**Founder | Superior Legal Solutions, LLC**



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Nothing in this guide should be **interpreted as legal advice**. Every family situation is unique, and laws may vary by state and circumstance. Individuals are encouraged to consult with a licensed attorney, financial advisor, or other qualified professional for advice specific to their situation.

## Bereavement Support Notice

This guide is designed to provide **general guidance, organization** tools, and emotional support reminders during the early days after a loss. It is not intended to replace professional legal, financial, medical, or mental health advice.

- ✓ A licensed grief counselor
- ✓ A trusted spiritual leader
- ✓ A mental health professional
- ✓ A local grief support group

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# QUICK START GUIDE

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**The Quick Start Guide** is a short, easy-to-read resource designed to help families during the first few days and weeks after the loss of a loved one.

## **What This Guide Includes:**

- The most important first steps to take
- A basic list of important documents
- Who to contact immediately

## **Early financial and estate-related tasks**

- A short emotional care reminder
- Contact information for support resources

## **Who This Guide Is For**

Families who may feel overwhelmed and need clear, simple direction-not complex details, but guidance on what to do first.

## **Purpose**

**To give families immediate clarity and practical guidance**, helping reduce confusion during the early days when emotions are often at their highest.

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# GUIDE OVERVIEW

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# *Serenity Aftercare™ Framework*



Get to the  
Heart of Loss

# 1

## FIRST 72 HOURS

### 1

#### **Contact a funeral home or cremation provider**

##### **Confirm transportation and basic arrangements.**

- ✓ *Ask the funeral home how many death certificates you should request.*

### 2

#### **Notify close family and key support people**

You don't have to call everyone at once.  
Focus on the closest loved ones first.

### 3

#### **Secure the home and personal items**

- Lock doors and windows
- Secure medications and valuables
- Arrange care for pets
- Collect mail

### 4

#### **Locate a few key documents**

- ID (driver's license or state ID)
- Social Security card (if available)
- Insurance cards
- Any visible life insurance paperwork

### 5

#### **Take care of yourself**

Eat, drink water, sit down between tasks, and ask for help.  
You do not have to handle everything right now.

# 2

## EMOTIONAL CARE & SUPPORT

This is a very tender time. It's normal to experience many emotions, including:

- **Shock**
- **Sadness**
- **Numbness**
- **Confusion**
- **Anger**
- **Relief**
- **Overwhelmed**

Give yourself permission to feel whatever you are feeling.

### **Helpful supports:**

- Family and friends you trust
- Spiritual leaders or faith communities
- Grief support groups (online or in person)
- Counselors or therapists

### **Small practices that help:**

- Taking 5–10 deep breaths
- Sitting outside for a few minutes
- Drinking a glass of water
- Saying, "I don't have to do everything today."

# 3

## FAMILY SUPPORT HOTLINE

This page gives families one place to reach out for guidance, reducing confusion and providing supportive aftercare during a difficult time.

### AFTER THE LOSS FAMILY SUPPORT LINE

**If you need guidance, organization help, or you are unsure what to do next, you can contact:**

#### **Superior Legal Solutions, LLC**

*Helping Families Handle Affairs with Care, Clarity & Compassion*



**Family Support Line: (850) 567-3138**



**[info@slegalsolutions.com](mailto:info@slegalsolutions.com)**



**Tallahassee, Florida**

#### **How We Support You:**

- Answering after-loss questions
- Helping you understand what steps to take
- Clarifying documents, notifications, and accounts
- Providing guidance with organization
- Offering emotional reassurance and clear next steps

***You do not have to navigate this process alone.***

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# *Serenity Aftercare™ Framework*



**Get Down  
to Business**

# 4

## ESSENTIAL DOCUMENTS TO GATHER (FIRST WEEK)

During the first week, begin gathering a small folder or envelope with important documents such as:

- Will or Trust documents (if available)
- Life Insurance policies
- Recent Bank Statements
- Mortgage or lease documents
- Utility bills
- Retirement or pension statements

**Notes:**

You do not need every document right away—just begin collecting what you can easily find.

# 5

## WHO TO NOTIFY IMMEDIATELY

- **Funeral home/cremation provider** – for arrangements and death certificates
- **Employer** – to stop payroll and begin any benefits process
- **Social Security Administration** – to report the death
- **Primary care doctor or facility** – especially if equipment or prescriptions are involved

**If you are not sure what to say, a simple script like this can help:**

**“I’m calling to let you know that [Name] passed away on [Date]. I’m handling some of their affairs and wanted to ask what steps I need to take with your office.”**

**TIP:** Write down the name of the person you speak with and any instructions they provide.

**Notes:**

# 6

## BASIC FINANCIAL TASKS (FIRST 1-2 WEEKS)

- Make a list of urgent bills (rent/mortgage, utilities, insurance).
- Avoid paying large medical or credit card bills until you understand what the estate is responsible for.
- Keep every bill or notice you receive in one place—do not discard anything yet.
- Monitor bank accounts for unusual withdrawals or charges.
- Do not close bank accounts immediately until you understand what funds may be needed for estate expenses.

**Remember: You are often not personally responsible for the deceased's debts unless you were a co-signer or joint account holder, or otherwise legally responsible**

**Notes:**

## ACCOUNT & ORGANIZATION TRACKER

Use this page to track organizations you have contacted and any steps they require.

ORGANIZATION/ COMPANY	CONTACT NAME	PHONE/ EMAIL	DOCUMENTS NEEDED	DATE CONTACTED	STATUS
BANK					<input type="checkbox"/>
LIFE INSURANCE COMPANY					<input type="checkbox"/>
EMPLOYER/HR					<input type="checkbox"/>
SOCIAL SECURITY ADMINISTRATION					<input type="checkbox"/>
PENSION/RETIRE MENT PLAN					<input type="checkbox"/>
MORTGAGE OR LANDLORD					<input type="checkbox"/>
UTILITIES COMPANIES					<input type="checkbox"/>
CREDIT CARD COMPANIES					<input type="checkbox"/>
OTHER					<input type="checkbox"/>

**Tip:** Write down the name of the person you speak with and any instructions they give you. This will help you avoid repeating steps later.

## IMPORTANT INFORMATION AND PASSWORD TRACKER

Record important account information, passwords, and access codes in the lists below

ACCOUNT/ WEBSITE	USER ID	PASSWORD / CODE	DOCUMENTS NEEDED	DATE CONTACTED	STATUS
BANK					<input type="checkbox"/>
LIFE INSURANCE COMPANY					<input type="checkbox"/>
EMPLOYER/HR					<input type="checkbox"/>
SOCIAL SECURITY ADMINISTRATION					<input type="checkbox"/>
PENSION/RETIRE MENT PLAN					<input type="checkbox"/>
MORTGAGE OR LANDLORD					<input type="checkbox"/>
UTILITIES COMPANIES					<input type="checkbox"/>
CREDIT CARD COMPANIES					<input type="checkbox"/>
OTHER					<input type="checkbox"/>

**Tip:** Safely storing this page is critical. Consider keeping it in a secure location such as a locked safe or lawyer's office.

# *Serenity Aftercare™ Framework*



Get  
Organized

# 7

## QUICK START CHECKLIST

This is a simplified checklist is designed to be short, actionable, and easy for families to follow.

### QUICK START CHECKLIST

#### First 72 Hours:

- Contact funeral home or cremation provider
- Notify close family members
- Secure home and belongings
- Arrange pet care
- Gather ID and insurance cards
- Request certified death certificates

#### Documents to Gather Early:

- Life insurance policies and information
- Bank and financial statements
- Lease or mortgage papers
- Retirement or pension details
- Utility bills
- Create a folder or envelope to store documents

#### Who to Notify:

- Social Security Administration
- Employer/HR department
- Primary care doctor or Medical Provider
- Insurance Companies

#### Next Steps:

- Track urgent bills
- Pause unnecessary payments
- Keep all mail and notices together in one place
- Breathe, rest, and take breaks

**Tip:** Check off each item as you complete it so you can easily see your progress

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## “WHAT TO EXPECT NEXT” Timeline Overview

A simple roadmap to help guide families through the first days and weeks after a loss.

### 1 FIRST 72 HOURS — IMMEDIATE STEPS



Contact the funeral home → Notify close family members → Secure home and property → Gather key documents.

### 2 FIRST WEEK — START ORGANIZING



Locate life insurance → Gather bills → Track mail → Identify financial accounts → Pause auto-payments.

### 3 FIRST 2 WEEKS — NOTIFY KEY AGENCIES



Social Security → Employer → Banks → Insurance → Credit cards.

### 4 WEEKS 2-6 — BEGIN SETTLING AFFAIRS



Review financial accounts → Secure property + vehicles → Organize documents → Track what's completed.

### 5 ONGOING — EMOTIONAL CARE & SUPPORT



Take breaks → Talk with supportive people → Join a grief support group → Give yourself grace.

### 6 WHEN READY — USE THE FULL BEREAVEMENT BLUEPRINT



Move into detailed steps for probate, estate tasks, digital accounts, property matters, and long-term organization.

**Quick Start Guide** = immediate first steps

**Bereavement Blueprint** = complete step-by-step guide

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# NOTES & IMPORTANT INFORMATION

Use this page to jot down important information, questions you want to ask, or next steps you want to remember. This space is just for you — write freely, and keep track of anything important.

## You may want to note things like:

- Names of people you spoke with
- Phone numbers or people to follow up with
- Questions for attorneys or financial institutions
- Tasks to complete later

Take things one step at a time. You are not alone in this process.

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## NEXT STEPS & HOW SUPERIOR LEGAL SOLUTIONS CAN HELP

The **Quick Start Guide** is designed to steady you during the first few days after loss. When you are ready for more detailed guidance, **The After The Loss Bereavement Blueprint** provides step-by-step guidance through:

- **Notifications**
- **Important documents**
- **Estate and financial responsibilities**
- **Property matters and digital accounts**
- **Emotional support and long-term organization**

For guidance or support, contact:



**FAMILY SUPPORT LINE** (850) 567-3138



**INFO@SLEGALSOLUTIONS.COM**



**WWW.SLEGALSOLUTIONS.COM**



**Tallahassee, Florida**

*You do not have to navigate this process alone.*

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# RESOURCES & SUPPORT

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Visit us for helpful resources and guidance.

[www.slegalsolutions.com](http://www.slegalsolutions.com)



Helping Families Handle Affairs with  
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Need help navigating the next steps after a loss?

**SCAN HERE**

