

Checklist: Steps to Take After the Passing of a Loved One

Immediate Steps

- Notify Family and Friends**
 - Contact close family members and friends to inform them of the death.
- Contact a Funeral Home
 - Arrange for the body to be transported to a funeral home.
 - Discuss funeral and memorial service arrangements.
- Obtain **Death Certificates**
 - Request multiple copies of the death certificate from the funeral home or the local health department.
- Legal and Administrative Tasks**
- Notify Relevant Institutions**
 - Inform the deceased's employer (if applicable).
 - Notify **social security, insurance** companies, **banks**, and other financial institutions.
 - Contact** the deceased's **attorney, if they had one.**
- Secure the Deceased's Property**
 - Ensure that their home and other property are secured and protected.
- Locate the Will and Estate Documents**
 - Find the will and any other estate planning documents.
- Probate the Will (Probate Necessary? Call today to find out 951-223-1157)**
 - File the will with the local probate court to start the probate process.
 - The court will appoint an executor to handle the estate.
- Notify Creditors and Close Accounts**
 - Inform creditors of the death and settle any outstanding debts.
 - Close bank accounts, credit cards, and other financial accounts.
- Handling Property and Possessions**
- Inventory Assets and Liabilities**
 - Make a detailed list of the deceased's assets and liabilities. (Need Spreadsheet?, Call us and we'll send you one for FREE 951-223-1157)
- Distribute Assets According to the Will**

This checklist is intended as a basic guide and not as legal advice. Every situation is unique. For a free consultation, please call us today. We're here to help.

Visit us at www.EasyProbateHelp.com or call 951-223-1157.

- Follow the instructions in the will for distributing property and possessions.
- Appraise and Sell Property** (if necessary) (**Need Value**, Call us 951-223-1157)
 - Have valuable items appraised to determine their worth.
 - Sell property that needs to be liquidated.
- Handle Personal Belongings (Need Trusted Estate Sales Companies?** 951-223-1157)
 - Sort through personal belongings. Take your time and ask for help from family or friends if needed.
 - Distribute personal items** to family members as **outlined in the will** or by mutual agreement.
- Address Digital Assets
 - Close email accounts and social media profiles.
 - Access and manage digital assets such as online financial accounts and subscriptions.
- Final Steps**
- File Final Tax Returns**
 - File the deceased's final income tax return.
 - If the estate is large, you may need to file an estate tax return.
- Consult with Professionals (Call 951-223-1157 for help)**
 - Work with an estate attorney and a financial advisor to ensure all legal and financial matters are handled correctly.
- Grief Support
 - Consider seeking support from grief counselors or support groups to help cope with the loss.

Notes:

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