

A Survivor's Checklist

THINGS THAT NEED TO BE DONE WHEN A LOVED ONE DIES



IMMEDIATE:

- Obtain signed death certificate. Autopsy?
- Inventory safe deposit boxes and personal papers of the deceased. Look for any organ donation authorizations, burial insurance policies, prepaid mortuary or cremation society plan.
- Organ donation? (Must be within 24 hours.) Check for signed authorizations and arrange for donation immediately.
- Contact mortuary to make burial/cremation and funeral arrangements. Arrange for obituary notice.
- Contact friends and relatives. ALLOW YOUR FRIENDS AND RELATIVES TO HELP YOU OUT IN THIS TIME OF NEED.
- Make arrangements for pets (if any).
- Cancel regular elder assistance services (such as Meals on Wheels), if necessary.
- Obtain certified copies of the death certificate from the mortuary. (Consider purchasing 10 to 20 copies.)

WITHIN 30 DAYS:

- If applicable, notify:
 - Social Security Administration to stop checks
 - California Department of Health Care Services if the deceased was receiving Medi-Cal
 - Veterans Benefits Administration
 - Payers of any pensions (such as a former employer) or annuities
 - California Department of Motor Vehicles (DMV)
- Locate documents such as: a will, trust(s), insurance policies and deeds to real estate.
- If there was a Living Trust, **CONTACT:**
 - Successor Trustee (Trust Manager) for eventual distribution of assets
 - Sunrise Financial Services (206-420-8520)** for review of any potential death and/or income taxes owed, as well as assistance in sorting out and distributing assets
 - Insurance companies to arrange for any death benefits to be paid to beneficiaries
 - IRA and pension companies for any death benefits to be paid to beneficiaries
- If there was NO trust and only a will, **CONTACT:**
 - County Clerk and deposit the original will within 30 days
 - Executor to begin the probate process with an attorney
 - Sunrise Financial Services (206-420-8520)** for review of any potential death and/or income taxes owed, as well as assistance in sorting out and distributing assets

WITHIN 60 DAYS:

- Notify all creditors and utility companies
- Transfer title on jointly held assets
- Inventory personal effects and arrange for disposition to family members, friends or charities

WITHIN SIX MONTHS:

- IF A SURVIVING SPOUSE:**
 - Contact Sunrise Financial Services (206-420-8520)** for review of finances and revised financial game plan (e.g., replace a lost pension, help preserve remaining assets, etc.).
 - Update your will or trust.

Courtesy of Sunrise Financial Services

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