



with KATIE DUNCAN





AFTER DEATH TO-DO CHECKLIST

INSTRUCTIONS:

Use this checklist to help you follow through with the after death To-Do list of things that need to be completed.

INITIAL STEPS JUST AFTER DEATH:

- ☐ Pause
- ☐ Perform ritual or ceremony (if applicable)
- ☐ Call nearby family or close friends if they'd like to see your person before being picked up by funeral or other arrangement
- ☐ Call Hospice (or other healthcare team)
- ☐ Either you or Hospice (or other healthcare team) will contact Funeral Home (or other) to pick up your person's body
- ☐ Hospice will either destroy leftover medications or instruct you on proper disposal
- ☐ Within 24-48 hours all hospice equipment will be picked up by equipment company

WITHIN A FEW DAYS:

- ☐ Notify others of your person's death (Use Spokesperson)
- ☐ Funeral Preparation & Participation
- ☐ Secure Possessions & Valuables
 - ☐ Consider initial walk through of your person's home
 - ☐ Quick & light clean, clearing & collecting of items
 - ☐ Used items can be donated
 - ☐ Throw out old food



- ☐ Safely store valuables
- ☐ Lock up home and vehicle
- ☐ Ask neighbor or friend to watch over home
 - ☐ Collect mail
 - ☐ Water plants
 - ☐ Take out trash (if needed)
- ☐ Pet Care
 - ☐ Find someone to care for pet temporarily until you find permanent home
- ☐ Forwarding Mail
 - ☐ Go to the post office
 - ☐ Request a forwarding order to send the mail to the Executor or whoever is handling the estate
- ☐ Notify Employer
 - ☐ Request any information on paychecks due, benefits & life-insurance policies

WITHIN 2 WEEKS AFTER DEATH:

- ☐ Obtain Death Certificate
 - ☐ Request 5-10 copies
 - ☐ Funeral Home can obtain these for you
 - ☐ Or request from Vital Statistics Office in the state they died (government site)
- ☐ Find the Will (if applicable)
- ☐ Contact the Executor (if applicable)
- ☐ Meet with Estate, Probate, or Trusts Lawyer
 - ☐ You do not need an attorney to settle the estate, but it can make the process much smoother.
- ☐ Track down all assets



- ☐ Give list to executor
- ☐ Probate attorney will request this list
- ☐ Make a list of all Bills, Payments & Subscriptions
 - ☐ Give list to Executor. These will need to be paid and terminated.
- ☐ Contact the following (if applicable):
 - ☐ Social Security Administration (Funeral director may do this, but check)
 - ☐ Life Insurance Policy
 - ☐ Financial Planner/Advisor
 - ☐ Accountant
 - ☐ Banks & Financial Organizations
 - ☐ Credit Agencies
 - ☐ Equifax
 - ☐ Experian
 - ☐ TransUnion
- ☐ Close Credit Card Accounts
- ☐ Stop Insurance Policies & Plans
 - ☐ Health insurance
 - ☐ Homeowners insurance
 - ☐ Automobile insurance
 - ☐ Long Term Care insurance
 - ☐ Life insurance
- ☐ Terminate Driver's License
 - ☐ Contact Motor Vehicle Administration
- ☐ Remove their Voter Registration
 - ☐ Use the [U.S. Election Assistance Commission Website](https://www.electionassistancecommission.gov/) for more details and specific instruction which may vary by state.
 - ☐ Here is a [direct state contact list](#). Depending on the state they were registered you may need to provide:
 - ☐ Notice of death in writing



- ☐ Notice of death by affidavit
- ☐ Notice of death by Death Certificate
- ☐ Update Social Media Accounts
 - ☐ Delete or Memorialize (under 'Profile Settings')
- ☐ Shut Down Email Accounts
- ☐ Seek out support and give yourself permission to grieve

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